Overview Report

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Background

An association of Canadian tourism ministries and organizations have collaborated and conducted two large scale surveys to assess the travel activities and motivators of Canadian and American travelers.

This survey, known as the *Travel Activities & Motivation Survey* (TAMS), represents a comprehensive assessment of travel behavior and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior.

The TAMS project examines travel behaviour of the past two years (approximately December 1997 to November 1999) and travel intentions over the next two years (approximately December 1999 to December 2001). It also explores a wide array of travel experiences, activities and preferences, brief and longer vacations and the image of Canada/Ontario, within Canada and the United States. This report provides an overview of the TAMS project.

Research Design

The TAMS project consisted of a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 to April 16, 2000.

The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household.

Persons participating in the telephone survey who had traveled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire, while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

A stratified random probability sample was used in this research with over representation within the U.S. border regions (a prime market for Canadian tourism). The data has been weighted to adjust for the sample quotas and to project the results to the national level in both Canada and the United States.

Statistics Canada was responsible for the survey data collection in Canada and PriceCoopersWaterhouse for the data collected in the U.S. survey. Lang Research was commissioned to design, conduct and present the findings from this research.

Telephone Survey

The telephone survey was approximately 20 minutes in duration and collected the following information:

- Travel destinations and season traveled during past two years
- Reasons for travel in last two years
- Travel intentions during the next two years
- Reasons for not considering a trip to Canada/Ontario
- Reasons for not traveling (past two years and/or next two years)
- Day-to-day leisure activities while not on vacation
- Media consumption habits (television, magazine, VCR rentals)
- Association memberships, trade show attendance
- Ownership of vacation home or Recreational vehicle
- Use of the Internet to book travel or collect information
- Demographics of respondent and the household (e.g., age, household composition, education, occupation, income, nationality, birth place)

Mailback Survey

The mailback survey collected the following information:

- Vacation experiences sought during past two years and likely to seek during the next two years
- Outdoor vacation activities sought or likely to seek in past/next two years
- Cultural and entertainment activities sought/likely to seek in the past/next two years
- Accommodations stayed at on overnight travel in past/next two years
- Overnight and day tours taken or likely to be taken in past/next two years
- Types of business travel taken or likely to be taken in past/next two years
- Brief (1 to 3 day) and longer (4 plus day) vacation activity including seasons when trips were taken, travel companions, whether the trip was part of a scheduled tour, accommodations used and information sources consulted when planning such trips
- Use of vacation packages when traveling during the past two years
- Travel to Northern and Southern Ontario during past two years and intentions to travel to Northern and Southern Ontario during next two years
- Impressions of Canada and Ontario
- The extent to which selected new attractions increased interest in an Ontario vacation

TAMS Reports

Eleven detailed reports and 12 profile reports are planned for the TAMS database.

The detailed reports will examine selected topics in detail. The 11 detailed reports to be conducted with the TAMS databases are as follows:

- Overview Report of the TAMS project
- An Examination of Outdoor Vacation Activities
- An Examination of City Vacation Activities
- An Examination of the Touring Market
- U.S. Travel to Canada/ Canadian Travel within Canada
- Emerging Vacation Interests: What vacation experiences and activities are likely to be sought over the course of the next two years relative to the past two years
- The Lifespan Demographic Segmentation Report
- Canada's Ontario's Image in the United States and within Canada
- An Examination of Cultural/Historical Vacation Activities
- Getaway Travel versus Longer Vacation Activity
- Seasonal Travel Patterns

TAMS Reports

The 12 profile reports are intended to profile various sectors of the travel market based on their interest in various types of vacation experiences and travel activities. The profile reports are brief examinations of selected travel sectors.

Profile reports planned in the TAMS analysis series include the following:

- Wine and Cuisine Tourism
- Golfers
- Agro-Tourism/Rural Tourism
- Sport Enthusiasts
- Accommodations Used By Season
- Casino Tourism
- Aboriginal Tourism
- Downhill Skiing/Snow Boarding
- Learning/Educational Tourism
- Horticultural Tourism
- Convention Market
- Health Spas

Telephone Sample Description: Not Weighted

Attribute	*Level*	*Total*	*Canada*	*U.S.A*
Number of Interviews		46,782	28,397	18,385
Gender	Male	45.0 %	45.1 %	45.0 %
	Female	55.0 %	54.9 %	55.0 %
Age	18 to 25	13.6 %	13.3 %	13.9 %
	26 to 34	20.6 %	20.8 %	20.5 %
	36 to 44	23.3 %	24.1 %	22.8 %
	46 to 54	17.5 %	16.7 %	18.1 %
	56 to 65	11.2 %	11.4 %	11.0 %
	66 Plus	13.7 %	13.7 %	13.7 %
Education Level	High/Trade School	42.5 %	48.6 %	38.6 %
	College or University	49.3 %	46.7 %	51.0 %
	Advanced University Degree	8.1 %	4.7 %	10.4 %
Household Income	Under $20,000	14.8 %	17.8 %	12.8 %
	$20,000 to $40,000	22.9 %	24.6 %	21.8 %
	$40,000 to $60,000	18.9 %	19.0 %	18.9 %
	$60,000 to $80,000	11.8 %	11.7 %	11.8 %
	$80,000 to $100,000	6.4 %	6.3 %	6.4 %
	$100,000 Plus	8.8 %	7.4 %	9.7 %
	Refused/Don't Know	16.5 %	13.2 %	18.6 %

Household Income is stated in currency of each country.

Telephone Sample Description: Weighted

Attribute	*Level*	*Total*	*Canada*	*U.S.A*
Population in Universe		223,688,036	23,261,570	200,426,465
Gender	Male	48.1 %	49.2 %	48.0 %
	Female	51.9 %	50.9 %	53.0 %
Age	18 to 25	13.7 %	14.1 %	13.7 %
	26 to 34	29.8 %	19.9 %	19.8 %
	36 to 44	22.4 %	22.8 %	22.4 %
	46 to 54	17.0 %	17.3 %	17.0 %
	56 to 65	11.4 %	11.9 %	11.4 %
	66 Plus	15.6 %	14.0 %	15.8 %
Education Level	High/Trade School	42.4 %	50.4 %	41.5 %
	College or University	47.6 %	44.2 %	48.0 %
	Advanced University Degree	9.1 %	4.7 %	9.6 %
Household Income	Under $20,000	14.0 %	15.8 %	13.8 %
	$20,000 to $40,000	22.8 %	24.2 %	22.6 %
	$40,000 to $60,000	18.9 %	19.9 %	18.7 %
	$60,000 to $80,000	11.2 %	11.8 %	11.2 %
	$80,000 to $100,000	5.9 %	6.2 %	5.9 %
	$100,000 Plus	8.6 %	7.9 %	8.7 %
	Refused/Don't Know	18.6 %	14.2 %	19.1 %

Household Income is stated in currency of each country.

Mailback Sample Description: Not Weighted

Attribute	*Level*	*Total*	*Canada*	*U.S.A*
Number of Interviews		11,892	5,490	6,402
Gender	Male	43.7 %	44.0 %	43.6 %
	Female	56.3 %	56.0 %	56.4 %
Age	18 to 25	8.3 %	9.7 %	7.1 %
	26 to 34	17.9 %	19.1 %	16.8 %
	36 to 44	24.8 %	25.3 %	24.3 %
	46 to 54	21.7 %	20.0 %	23.1 %
	56 to 65	14.4 %	14.0 %	14.7 %
	66 Plus	13.0 %	11.9 %	14.0 %
Education Level	High/Trade School	31.8 %	38.0 %	26.5 %
	College or University	56.5 %	55.1 %	57.6 %
	Advanced University Degree	11.7 %	6.9 %	15.8 %
Household Income	Under $20,000	8.9 %	10.4 %	7.5 %
	$20,000 to $40,000	21.8 %	23.1 %	20.7 %
	$40,000 to $60,000	22.3 %	22.6 %	22.1 %
	$60,000 to $80,000	15.6 %	15.5 %	15.7 %
	$80,000 to $100,000	8.5 %	8.8 %	8.2 %
	$100,000 Plus	11.6 %	10.8 %	12.3 %
	Refused/Don't Know	11.3 %	8.8 %	13.5 %

Household Income is stated in currency of each country.

Mailback Sample Description: Weighted

Attribute	*Level*	*Total*	*Canada*	*U.S.A*
Population		190,901,879	19,618,857	171,283,022
Gender	Male	48.4 %	49.5 %	48.3 %
	Female	51.6 %	50.5 %	51.7 %
Age	18 to 25	12.3 %	13.6 %	12.2 %
	26 to 34	20.6 %	21.0 %	20.5 %
	36 to 44	24.7 %	24.5 %	24.7 %
	46 to 54	17.6 %	17.4 %	17.6 %
	56 to 65	11.8 %	12.5 %	11.7 %
	66 Plus	13.0 %	11.0 %	13.3 %
Education Level	High/Trade School	38.4 %	46.4 %	37.5 %
	College or University	51.2 %	48.3 %	51.6 %
	Advanced University Degree	10.3 %	5.4 %	10.9 %
Household Income	Under $20,000	10.0 %	12.4 %	9.7 %
	$20,000 to $40,000	23.6 %	24.2 %	23.5 %
	$40,000 to $60,000	19.9 %	21.2 %	19.8 %
	$60,000 to $80,000	12.9 %	13.1 %	12.9 %
	$80,000 to $100,000	7.0 %	7.7 %	6.9 %
	$100,000 Plus	9.5 %	8.6 %	9.6 %
	Refused/Don't Know	17.2 %	12.6 %	17.6 %

Household Income is stated in currency of each country.

Statistical Precision and Confidence Intervals

Since the survey is based on a random probability sample (rather than a complete census), the statistics reported in this study are estimates. The accuracy of these estimates will vary from analysis to analysis depending on the sample size, the type of measurement reported and measurement variations. The statistical precision associated with any given estimate is reflected by its confidence interval.

A confidence interval is an estimate of the range of values which would be expected by chance alone for a selected probability level. For example, the "95 % confidence interval" is the range of values which would be expected to occur randomly 19 times out of 20 (or 95 % of the time). Thus, if a survey found that 50 % of the individuals in a sample of 500 were interested in a given activity, the 95 % confidence interval for this estimate would be ±3.5 % (or between 53.5 % to 46.5 %). This means that if this survey were conducted 20 times with the same size of sample the estimated level of interested in a given activity would fall between 53.5 % and 46.5 % 19 times out of 20.

The estimated confidence interval is affected by several factors including the sample size, the type of measure taken (i.e., whether the measurement may assume two values such as "yes" or "no" or many values such as "household income") and the level of variation which exists within the data. As a guideline to interpreting the results of this study, estimates of the 95 % confidence intervals are provided for various sample sizes in the table below:

Number of Cases in Sample

Percent	46000	12000	5000	1000	500	100
50.00%	0.46%	0.89%	1.39%	3.10%	4.38%	9.80%
40.00%	0.45%	0.88%	1.36%	3.04%	4.29%	9.60%
30.00%	0.42%	0.82%	1.27%	2.84%	4.02%	8.98%
20.00%	0.37%	0.72%	1.11%	2.48%	3.51%	7.84%
10.00%	0.27%	0.54%	0.83%	1.86%	2.63%	5.88%
5.00%	0.20%	0.39%	0.60%	1.35%	1.91%	4.27%
2.00%	0.13%	0.25%	0.39%	0.87%	1.23%	2.74%

Household Lifecycle Stage

The Household Lifecycle Stage variable is used in several analyses throughout this report. This variable has been constructed taking the following variables into consideration: The age of the respondent, the age of all children under 21 living in the household, and the marital status of the respondent. There are eight lifecycle stages identified in this variable:

- Young Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Families: At least one child (of respondent) under 13 living in the home; No restrictions for age or marital status
- Mature Families: At least one child (of respondent) under 21 living in the home; No children under 13 living in the home; No restrictions for age or marital status
- Mature Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Mature Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Senior Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older
- Senior Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older

Lifespan Demographic Segments

- Method Used to Construct Segmentation -

Throughout this report, the TAMS data will be examined using a market segmentation known as the Lifespan Demographic Segments. This scheme identifies various demographic sectors in the market with common vacation patterns and interests.

The Lifespan Demographic Segmentation scheme is an anchored segmentation where the data has been aggregated by lifecycle stage, education level and household income. Households may be assigned to any given segment with information about the household lifecycle stage, the respondent's education and household income. As such, this scheme is a powerful tool to identify strategic segments.

The Lifespan Demographic Segmentation was developed using the Ontario Tourism Marketing Partnership tracking program, based on 7,241 interviews conducted between July 12, 1999 and April 26, 2000. The segmentation scheme uses information about the types of trips taken by each household, the respondent's tendency to research vacations and the household's vacation experience preferences and interests. Thirty-one core segmentor variables were used in this analysis including: The incidence of 19 types of vacation travel (e.g., family urban explorations, couples retreats, family visits, adventure travel); the extent to which vacations are carefully planned; the amount of information consulted to plan vacations; interest in opportunities to learn while on vacation; interest in novel and exotic destinations; interest in family-suitable vacations; the appeal of vacation packages; the appeal of outdoor vacations; the appeal of cultural exploration; the appeal of pampering and entertainment; the appeal of excitement and nightlife; and the appeal of relaxing in a quiet setting while on vacation.

Lifespan Segmentation Descriptions

Youth Segments

The three youth segments represent 20.3 % of the total market. Two of these are classified as Affluent Segments because of their household incomes and/or level of education. These households are all under 35, do not have children and are single or married couples.

Affluent Young Singles

- 5.9 % of market; 6.5 % of Canadian market; 5.8 % of U.S. market
- Lifecycle Stages: 100 % young singles; 64.0 % of respondents male
- Average Age: 25.3 years; Age Range: 54.5 % 18 to 25; 45.5 % 26 to 35
- Education: 67.7 % university or college educated; 9.7 % with advanced degrees (e.g., masters)
- Average household income: $72,000; Income Categories: 68.7 % $40K to $80K; 31.3 % $80K Plus

Affluent Young Couples

- 2.7 % of market; 3.9 % of Canadian market; 2.6 % of U.S. market
- Lifecycle Stages: 100 % young couples; 42.8 % of respondents male
- Average Age: 28.9 years; Age Range: 18.8 % 18 to 25; 81.2 % 26 to 35
- Education: 100 % university or college educated; 17.8 % with advanced degrees (e.g., masters)
- Average household income: $74,400; Income Categories: 66.2 % $40K to $80K; 33.8 % $80K Plus

Mainstream Youth Market

- 11.8 % of market; 13.2 % of Canadian market; 11.6 % of U.S. market
- Lifecycle Stages: 73 % young singles; 27 % young couples; 56.9 % of respondents male
- Average Age: 25.0 years; Age Range: 57.4 % 18 to 25; 42.6 % 26 to 35
- Education Level: 53 % university/college educated; 4.5 % with advanced degrees (e.g., masters)
- Average household income: $24,600; Categories: 93.3 % less than $40K; 6.8 % $40K to $80K

Lifespan Segmentation Descriptions

Family Segments

The three family segments represent 36.2 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. All of these households have children under 21 and are primarily married. The Mainstream Young Families have at least one child 12 or younger while the Mainstream Mature Families have children between the ages of 13 and 21 (but no children 12 and under).

Affluent Families

- 6.6 % of market; 5.8 % of Canadian market; 6.7 % of U.S. market
- Lifecycle Stages: 69.9 % young families; 26.4 % mature families; 50 % of respondents male
- Average Age: 41.two years; Age Range: 23.9 % under 35; 46.8 % 36 to 45; 29.3 % 46 and older
- Education: 100.0 % university or college educated; 29.1 % with advanced degrees (e.g., masters)
- Average household income: $107,400; Income Categories: 2.3 % $40K to $80K; 97.7 % $80K plus

Mainstream Young Families

- 23.0 % of market; 20.1 % of Canadian market; 23.4 % of U.S. market
- Lifecycle Stages: 100 % families with children 12 or younger; 42.9 % of respondents male
- Average Age: 35.3 years; Age Range: 52.8 % under 35; 37.1 % 36 to 45; 10.1 % 46 and older
- Education: 50 % university or college educated; 5.5 % with advanced degrees (e.g., masters)
- Average household income: $42,800; Income Categories: 49.0 % less than $40K; 51.0 % $40K plus

Mainstream Mature Families

- 6.6 % of market; 8.1 % of Canadian market; 6.4 % of U.S. market
- Lifecycle Stages: 100 % families with children between 13 and 21; 45.1 % of respondents male
- Average Age: 45.3 years; Age Range: 7.8 % under 35; 47.6 % 36 to 45; 44.6 % 46 and older
- Education Level: 47 % university/college educated; 5.5 % with advanced degrees (e.g., masters)
- Average household income: $48,200; Income Categories: 37.9 % less than $40K; 62.1 % $40K plus

Lifespan Segmentation Descriptions

Mature Segments

The three mature segments represent 30.4 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. These households are all between 36 and 64 and do not have children. (Note: 3.8 % of the mature market has been classified with seniors in the Affluent Mature and Senior Couples).

Affluent Mature Singles

- 5.1 % of market; 2.4 % of Canadian market; 5.4 % of U.S. market
- Lifecycle Stages: 100 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 48.5 years; Age Range: 40.2 % 36 to 45; 37.6 % 46 to 55; 22.2 % 56 to 65
- Education: 100 % university or college educated; 26.5 % with advanced degrees (e.g., masters)
- Average household income: $71,000; Income Categories: 72.8 % $40K to $80K; 27.2 % $80K plus

Mainstream Mature Couples

- 12.8 % of market; 18.0 % of Canadian market; 12.3 % of U.S. market
- Lifecycle Stages: 100 % mature couples (36 to 65); 52.1 % of respondents male
- Average Age: 52.1 years; Age Range: 23.4 % 36 to 45; 38.4 % 46 to 55; 38.2 % 56 to 65
- Education: 48 % university or college educated; 6.0 % with advanced degrees (e.g., masters)
- Average household income: $49,600; Income Categories: 34.1 % less than $40K; 59.8 % $40K plus

Mainstream Mature Singles

- 8.6 % of market; 6.8 % of Canadian market; 8.9 % of U.S. market
- Lifecycle Stages: 73 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 50.two years; Age Range: 35.0 % 36 to 45; 34.0 % 46 to 55; 31.1 % 56 to 65
- Education Level: 42 % university/college educated; 3.9 % with advanced degrees (e.g., masters)
- Average household income: $28,800; Income Categories: 84.0 % less than $40K; 16.0 % $40K plus

Lifespan Segmentation Descriptions

Mature/Seniors Segments

The three mature/senior segments represent 16.8 % of the total market. One of these segments is classified as an affluent segment because of its household incomes and/or level of education. The Affluent Mature and Senior Couples are primarily (85 %) from the mature market while the Mainstream Senior Couples and Senior Singles are all over 66 years old.

Affluent Mature and Senior Couples

- 4.5 % of market; 3.5 % of Canadian market; 4.7 % of U.S. market
- Lifecycle Stages: 85 % mature couples (35 - 65); 15 % senior couples (66 plus); 54.6 % male
- Average Age: 54.5 years; Age Range: 21.0 % 36 to 45; 37.3 % 46 to 55; 41.7 % 56 plus
- Education: 100 % university or college educated; 30.8 % with advanced degrees (e.g., masters)
- Average household income: $108,600; Income Categories: 100 % $80K plus

Mainstream Senior Couples

- 5.0 % of market; 6.5 % of Canadian market; 4.8 % of U.S. market
- Lifecycle Stages: 100 % senior couples (66 plus); 56.1 % of respondents male
- Average Age: 72.7 years; Age Range: 100 % 66 plus
- Education: 42.4 % university or college educated; 5.8 % with advanced degrees (e.g., masters)
- Average household income: $37,900; Income Categories: 57.4 % Less than $40K; 42.6 % $40K plus

(Affluent and Mainstream) Senior Singles

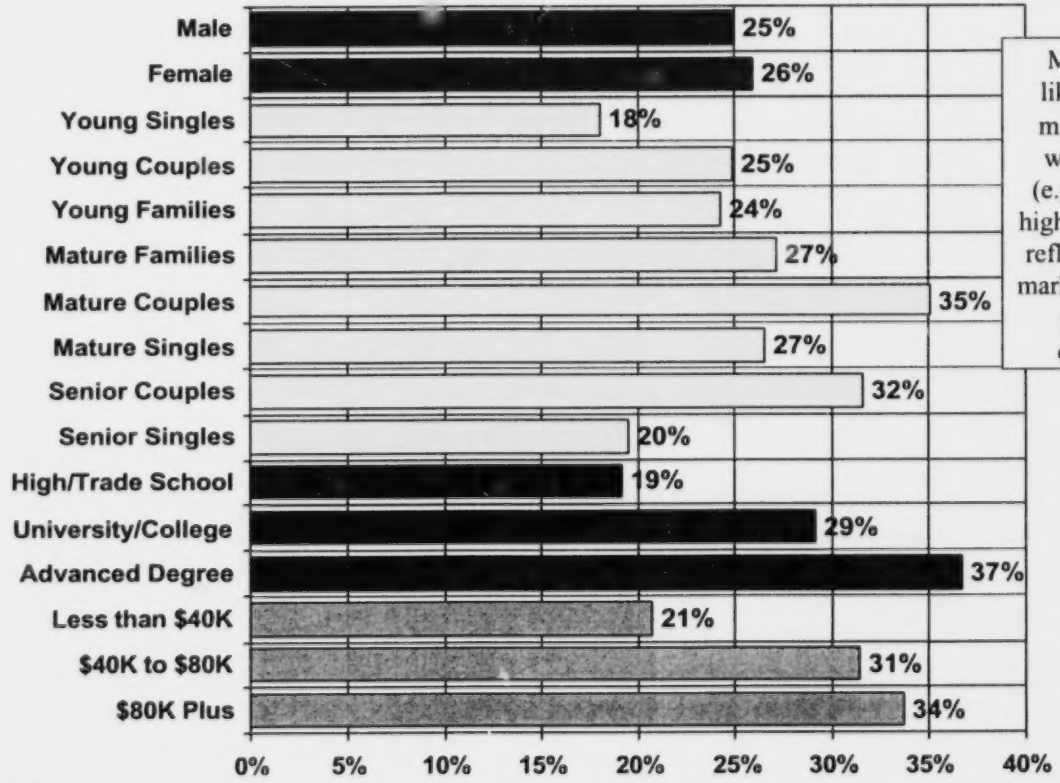
- 7.3 % of market; 5.1 % of Canadian market; 7.5 % of U.S. market
- Lifecycle Stages: 100 % senior singles; 35.6 % of respondents male
- Average Age: 74.9 years ; Age Range: 100 % 66 plus
- Education Level: 43 % university/college educated; 8.0 % with advanced degrees (e.g., masters)
- Average household income: $28,600; Income Categories: 78.7 % Less than $40K; 21.3 % $40K plus

Percent Returning Mailback Questionnaire

Base: Total Telephone Sample: Canada & United States

Not Weighted

By Demographics



Mailback questionnaires were more likely to have been returned by more mature couples and senior couples as well as those with advanced degrees (e.g., masters, Ph D) and persons from higher income households. This partially reflects the fact that these sectors of the market were more likely to have taken or plan to take vacations, and hence qualified for the mailback survey.

Technical Note

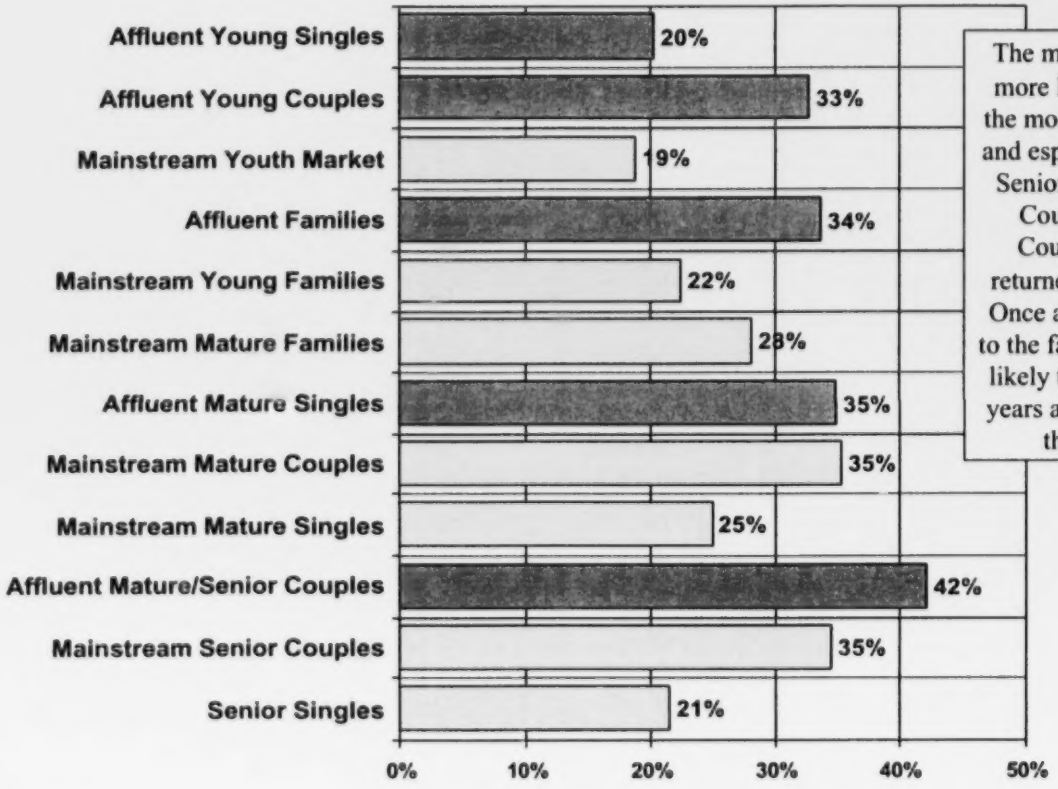
A weighting correction has been applied to adjust for the differential response rate for the mailback questionnaire. This adjustment allows the results from the mailback survey to be projected to the total population. All data shown in sections related to the mailback survey have been weighted.

Percent Returning Mailback Questionnaire

Base: Total Telephone Sample: Canada & United States

Not Weighted

By Demographics



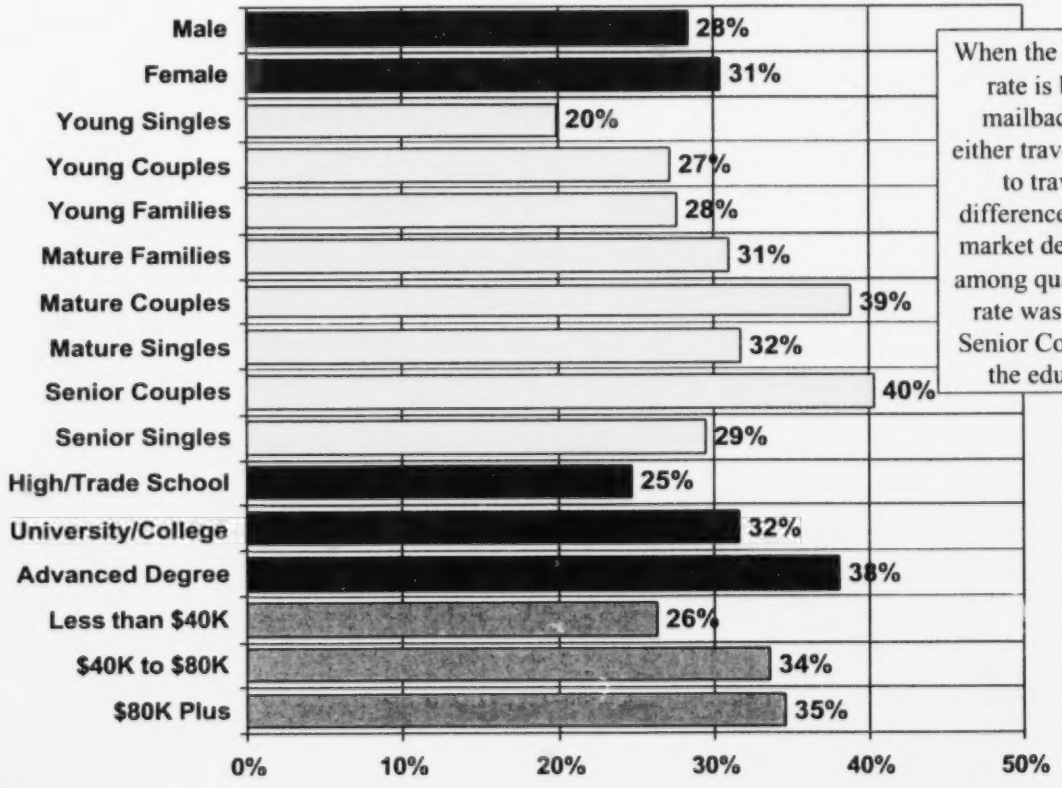
The mailback questionnaire was also more likely to have been returned by the more affluent sectors of the market and especially the Affluent Mature and Senior Couples. Mainstream Mature Couples and Mainstream Senior Couples were also likely to have returned the mailback questionnaires. Once again, this is partially attributed to the fact that these segments are more likely to have traveled in the past two years and therefore have qualified for the mailback questionnaire.

Percent Returning Mailback Questionnaire

Base: Those Taking a Trip in Last Two Years or Planning to Take A Trip

Canada & United States: By Demographics

Not Weighted



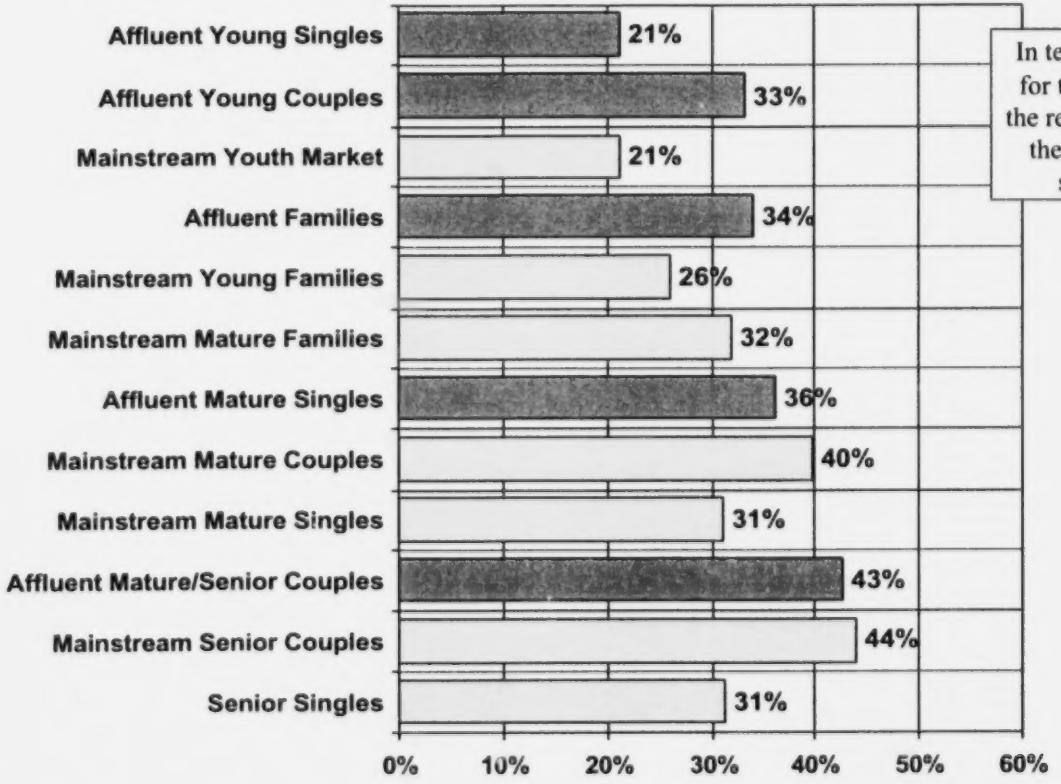
When the mailback questionnaire response rate is based on those eligible for the mailback questionnaire (because they either traveled in the past two years or plan to travel in the next two years, the differences between various sectors of the market decline somewhat. However, even among qualified respondents, the response rate was higher for Mature Couples and Senior Couples, and tends to increase with the education level of the household.

Percent Returning Mailback Questionnaire

Base: Those Taking a Trip in Last Two Years or Planning to Take A Trip

Canada & United States: By Market Segment

Not Weighted



In terms of respondents eligible for the mailback questionnaire, the response rate is higher among the more affluent and mature segments of the market.

Section Two

Travel Patterns

Travel Patterns

- Key Findings -

Americans travel to a greater number of destinations than Canadians. This is due to a much higher incidence of inter-state travel by Americans relative to inter-provincial travel among Canadians. Canadians are 253 % more likely to have taken a trip to the U.S. than Americans are to have taken a trip to Canada (33 % vs. 13 %). As such, Canadians have a north-south orientation to their travel patterns while Americans have an east-west orientation.

Travel activity levels are positively associated with the education level and household income of the individual. This is especially true for international travel.

In terms of the twelve market segments, the five affluent segments (Affluent Young Singles, Affluent Young Couples, Affluent Families, Affluent Mature Singles, Affluent Mature and Senior Couples) are the most active travelers. However, Mainstream Mature Couples and Mainstream Senior Couples also represent important travel markets.

While pleasure travel is more frequent during the summer season in both Canada and the United States, Americans are more likely to travel during the spring and fall seasons. The Affluent Sectors, and especially the Affluent Mature and Senior Couples, are prime markets for shoulder season travel. However, during the summer season the difference between the segments is diminished, and given their sheer size, Mainstream Young Families, Mainstream Mature Families, and Mainstream Mature Couples increase in strategic importance.

Travel Patterns

- Research Method -

The first portion of the telephone survey was used to assess the travel activities of respondents during the past two years.

Respondents were asked:

- How many overnight trips they had taken in the last two years
- Where they had taken their pleasure trips to: within state or province, to other states or provinces to Canada (from the U.S.) or to the United States (from Canada), to Mexico or the Caribbean or to other countries
- What season of the year they had taken trips to various destinations
- Why they had taken these trips (e.g., mainly for pleasure including trips to visit friends and relatives, mainly for business, mainly for other personal reasons or for some other reason)

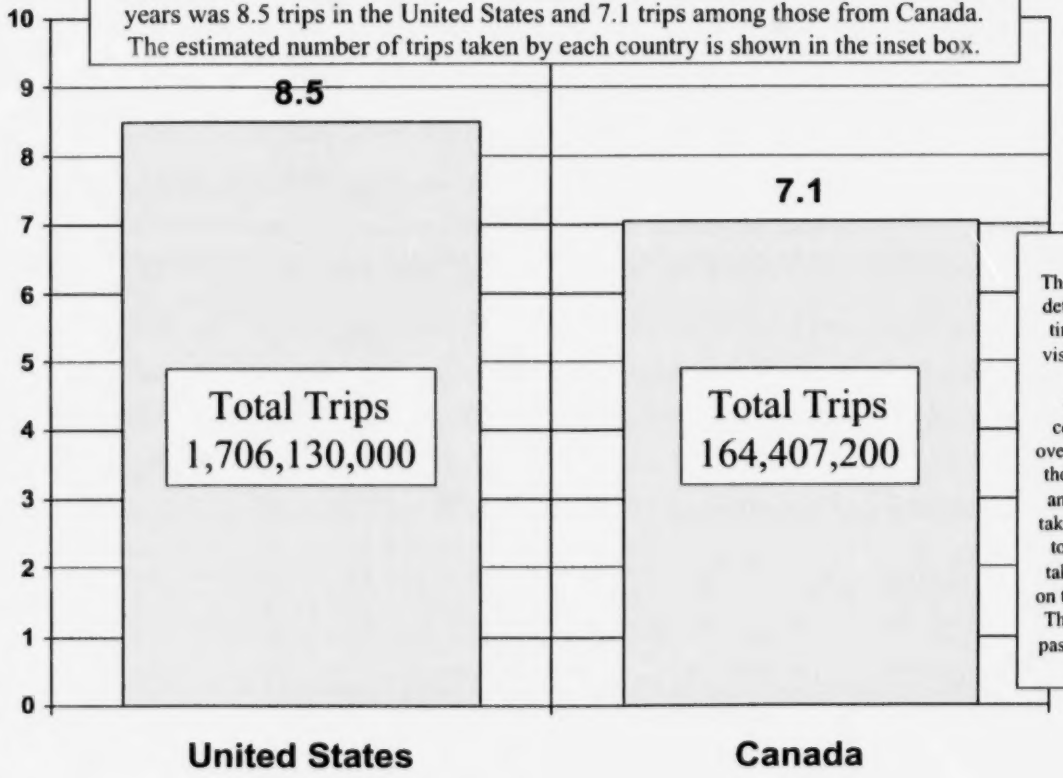
The section of the overview report will explore the responses to these questions.

Total Population (18 Plus)

Average Number of Overnight Trips Taken

During Past Two Years: Canada versus the United States

The average number of overnight trips taken by respondents during the past two years was 8.5 trips in the United States and 7.1 trips among those from Canada. The estimated number of trips taken by each country is shown in the inset box.



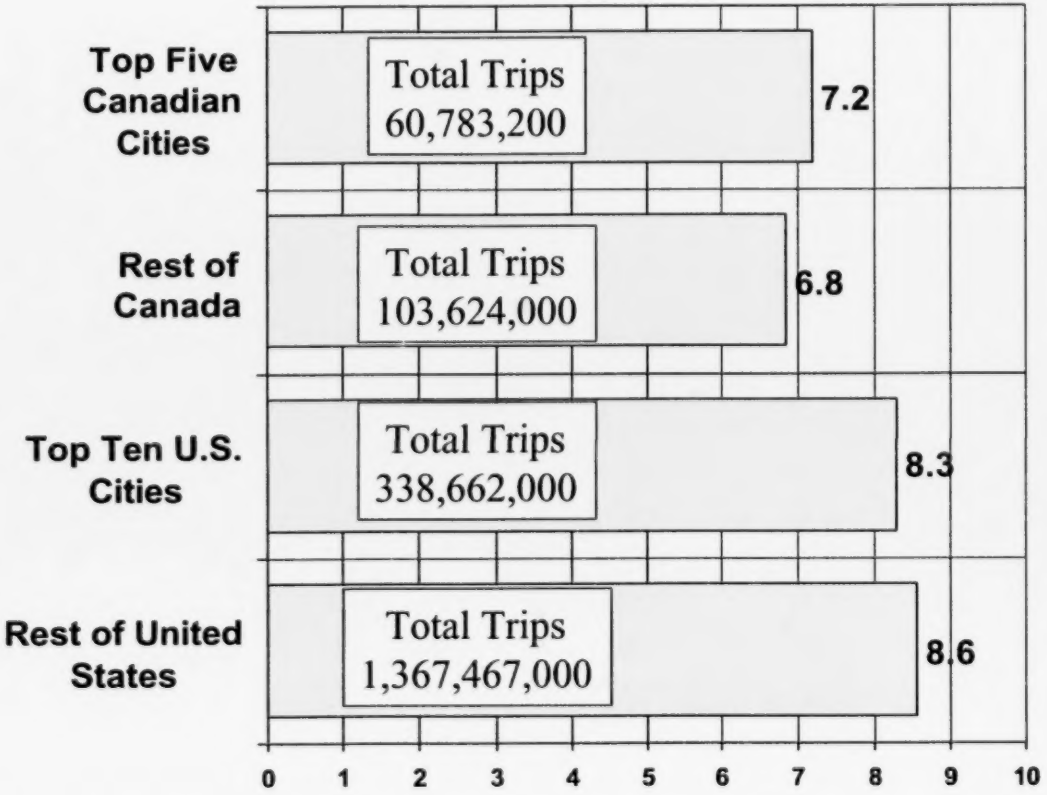
Technical Note

The estimated number of trips has been determined by summing the number of times selected destinations have been visited in the last two years. Therefore, if the respondent visits multiple destinations on the same trip, it is counted as more than one trip, hence over-estimating trips. On the other hand, the survey was restricted to persons 18 and older and therefore excludes trips taken by those 17 and under. This tends to under-estimate the number of trips taken. Note that this estimate is based on the entire population of each country. Those who had not traveled during the past two years were considered to have taken zero trips.

Total Population (18 Plus)

Average Number of Overnight Trips Taken

During Past Two Years: Major Urban centres versus Others



There was little difference between those from large urban centres and those from the rest of Canada/U.S. in terms of the number of overnight trips taken in the last two years.

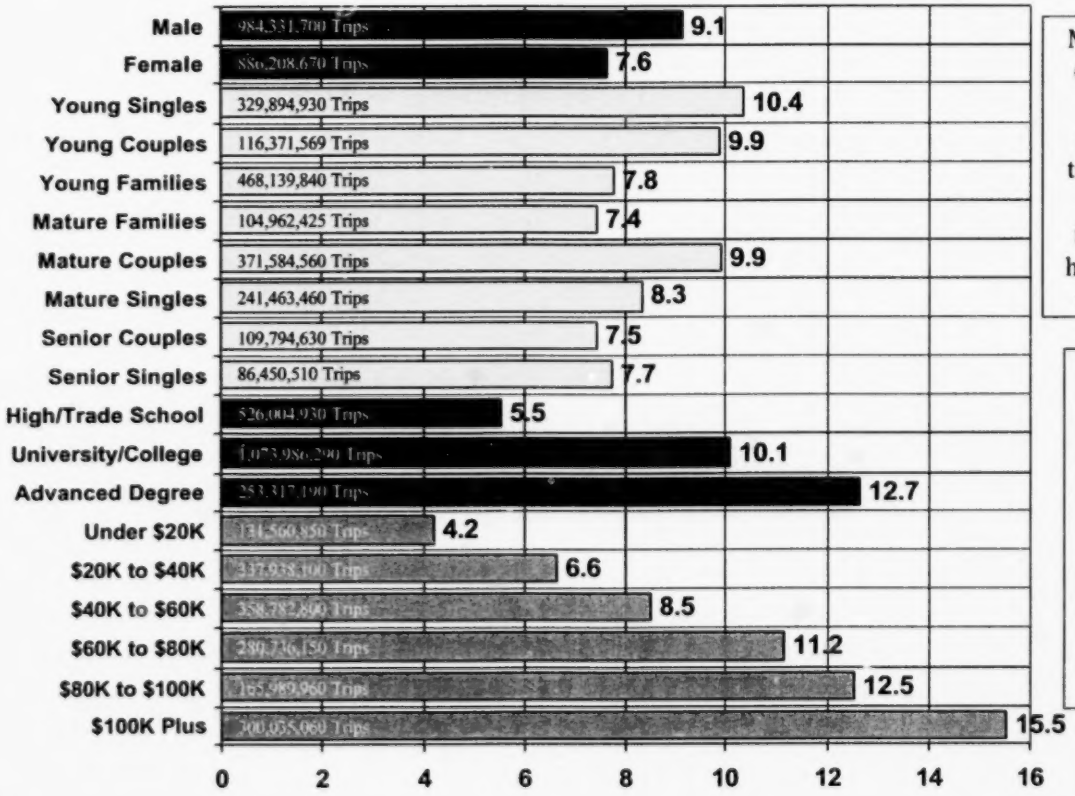
Technical Note

The top five Canadian cities in terms of populations include Calgary, Edmonton, Montreal, Toronto and Vancouver. The top ten U.S. cities in terms of population include Boston, Chicago, Dallas, Detroit, Houston, Los Angles, New York City, Philadelphia, San Francisco and Washington D.C.

Total Population (18 Plus)

Average Number of Overnight Trips Taken

During Past Two Years: By Demographics (Canada/U.S.A)



Males, Young Singles, Young Couples and Mature Couples were likely to have taken a greater number of overnight trips in the last two years. The number of trips taken also increases as a function of the household income and level of education of the respondent.

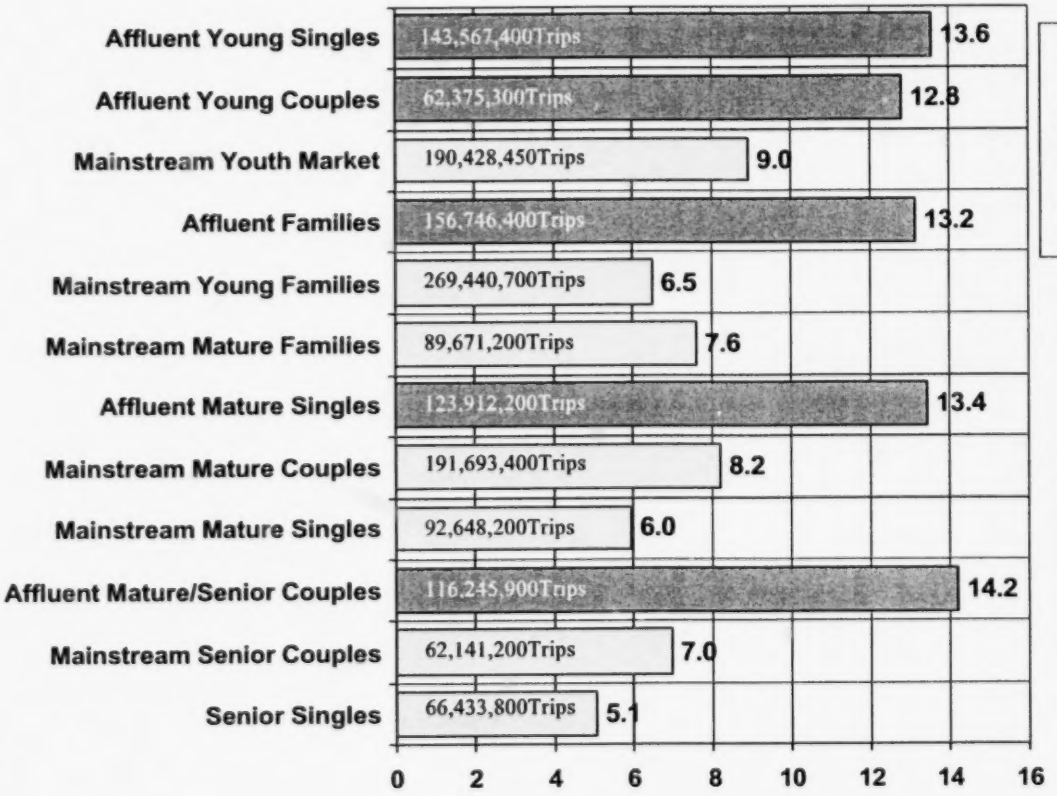
Technical Note

The estimated number of trips has been determined by summing up the number of times selected destinations have been visited in the last two years. Therefore, if the respondent visits multiple destinations on the same trip, it is counted as more than one trip, hence over-estimating trips. On the other hand, the survey was restricted to persons 18 and older and therefore excludes trips taken by those 17 and under. This tends to under-estimate the number of trips taken.

Total Population (18 Plus)

Average Number of Overnight Trips Taken

During Past Two Years: By Market Segment (Canada/U.S.A)



The number of overnight trips taken in the last two years was much higher among the affluent segments of the market. Beyond this, there is relatively little variation in the number of trips taken by the 12 segments.

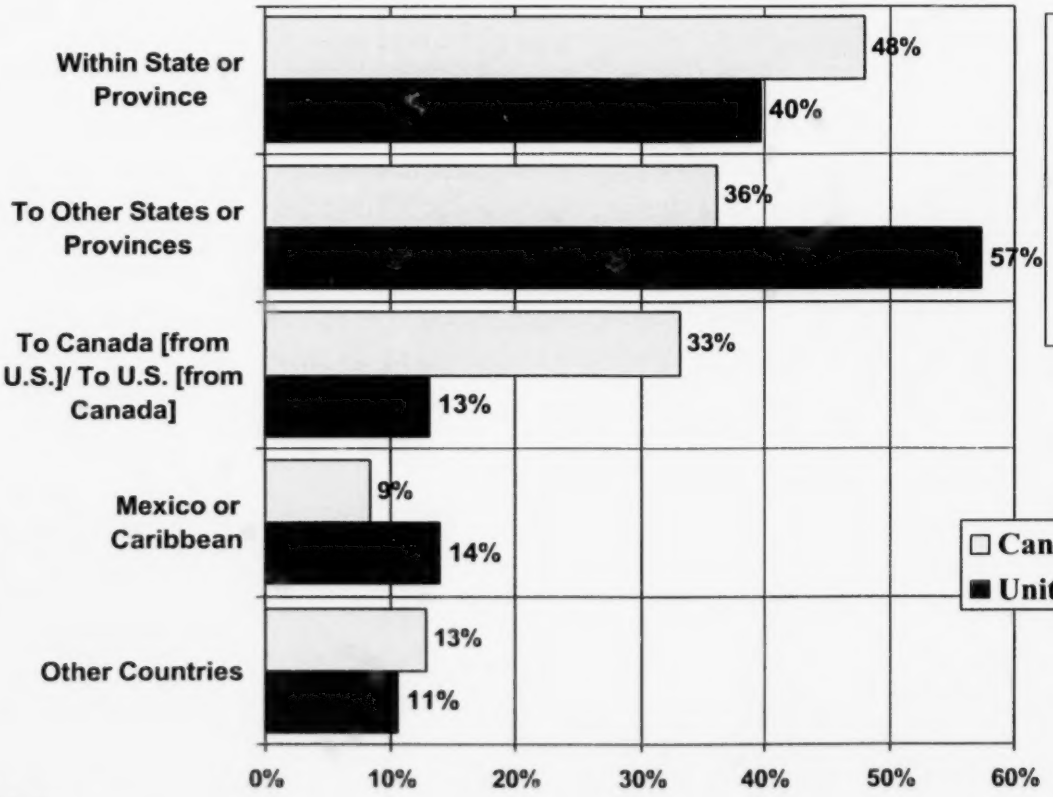
Technical Note

The estimated number of trips has been determined by summing up the number of times selected destinations have been visited in the last two years. Therefore, if the respondent visits multiple destinations on the same trip, it is counted as more than one trip, hence over-estimating trips. On the other hand, the survey was restricted to persons 18 and older and therefore excludes trips taken by those 17 and under. This tends to under-estimate the number of trips taken.

Total Population (18 Plus)

Percent Taking Overnight Pleasure Trips to Various Destinations

During Past Two Years: Canada versus the United States

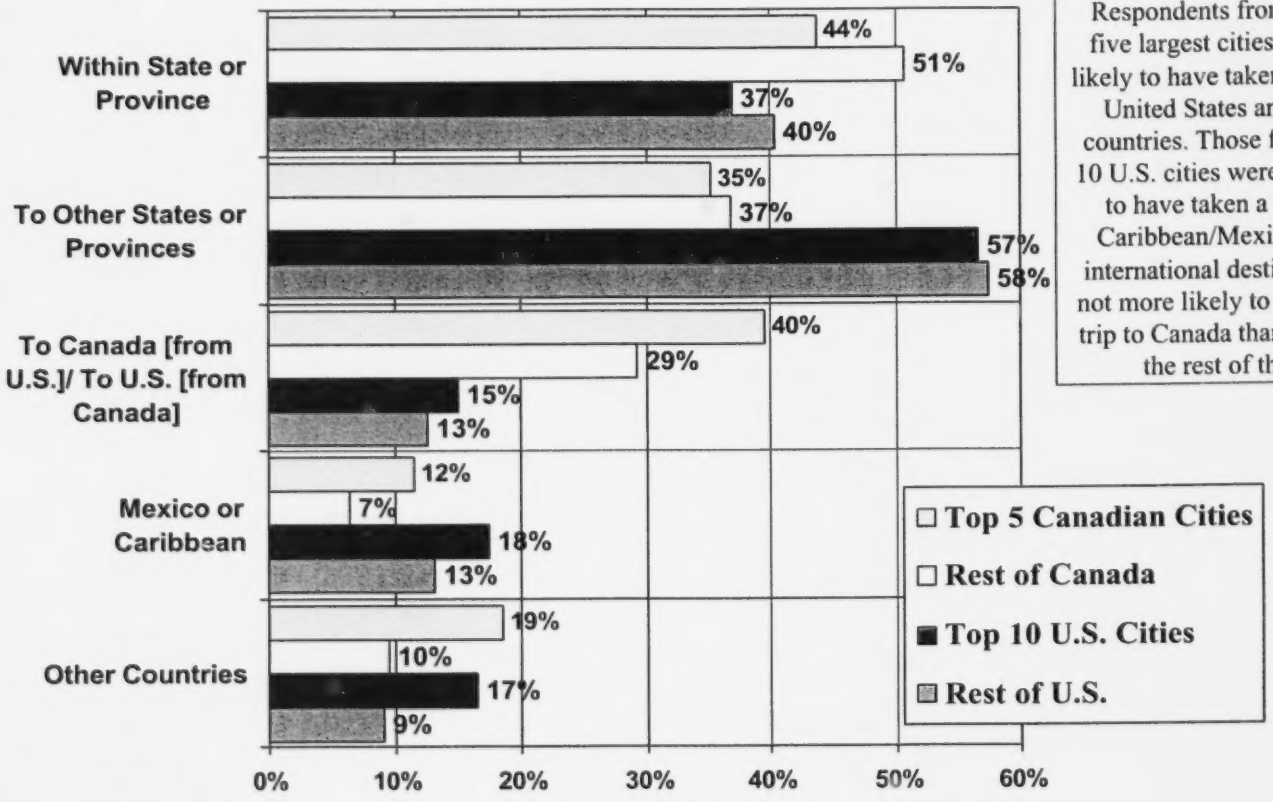


Respondents from Canada were more likely to take intra-provincial trips and trips to the United States. On the other hand, U.S. respondents were more likely to take trips to other U.S. states and to Mexico or the Caribbean than those from Canada. There was no difference in the percent who took trips to other countries (excluding Canada, U.S., Mexico and Caribbean).

Total Population (18 Plus)

Percent Taking Pleasure Overnight Trips to Various Destinations

During Past Two Years: Major Urban centres versus Others

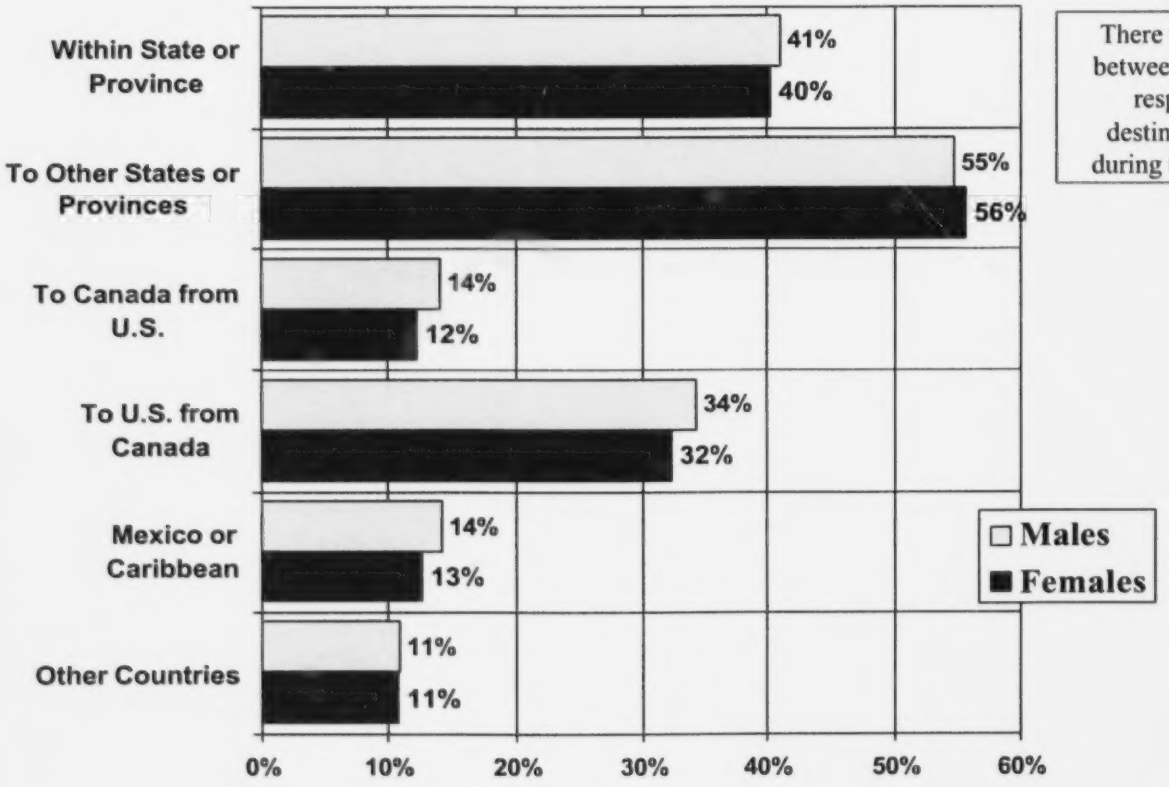


Respondents from Canada's five largest cities were more likely to have taken a trip to the United States and to other countries. Those from the top 10 U.S. cities were more likely to have taken a trip to the Caribbean/Mexico or other international destinations, but not more likely to have taken a trip to Canada than those from the rest of the U.S.

Total Population (18 Plus)

Percent Taking Overnight Pleasure Trips to Various Destinations

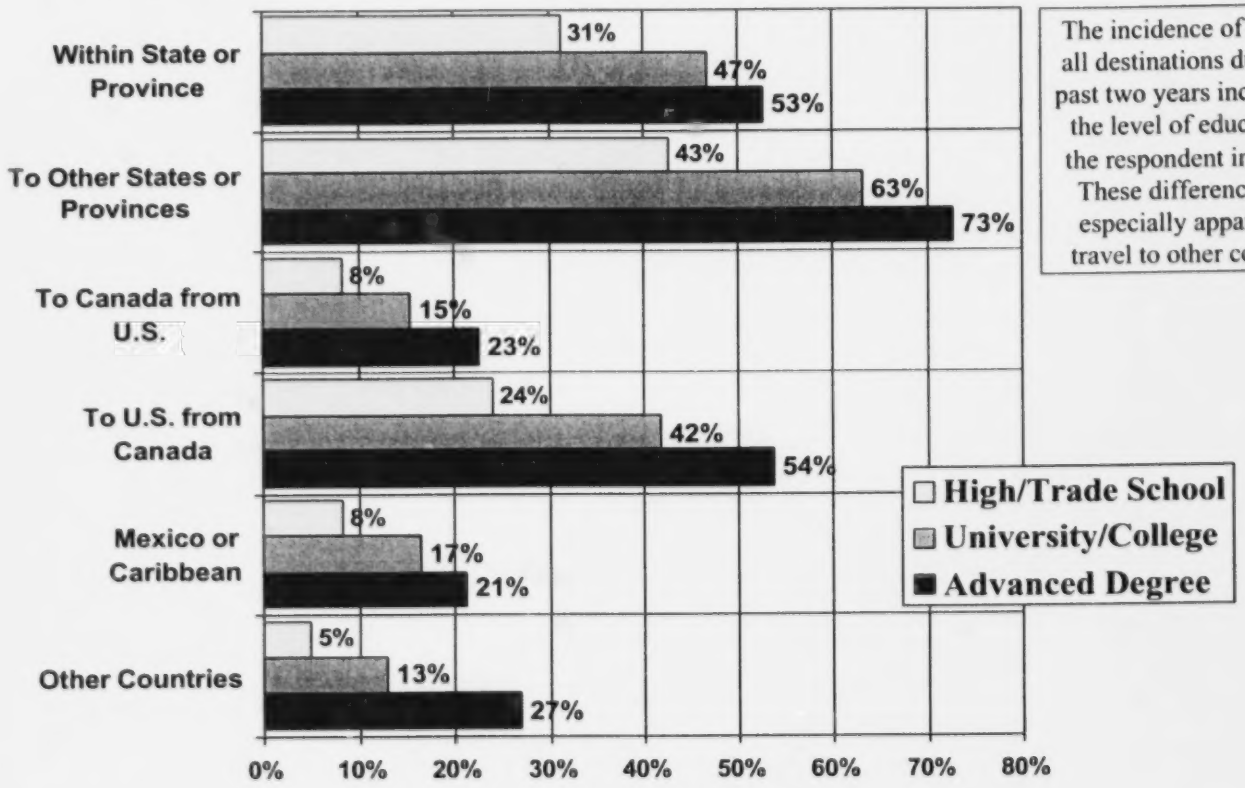
During Past Two Years: Males versus Females (Canada/U.S.)



There was no difference between male and female respondents in the destinations traveled to during the past two years.

Total Population (18 Plus)

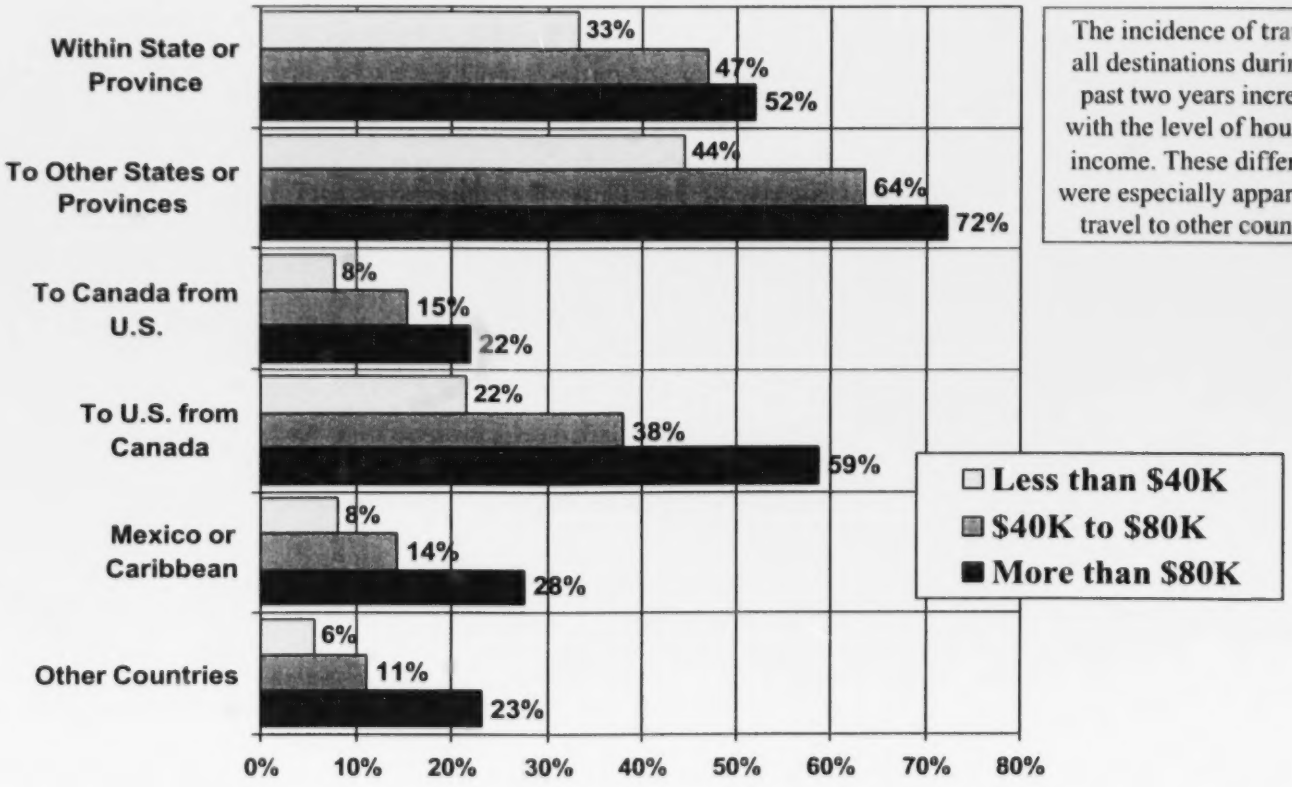
Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years: By Education Level (Canada/U.S.)



The incidence of travel to all destinations during the past two years increased as the level of education of the respondent increased. These differences were especially apparent for travel to other countries.

Total Population (18 Plus)

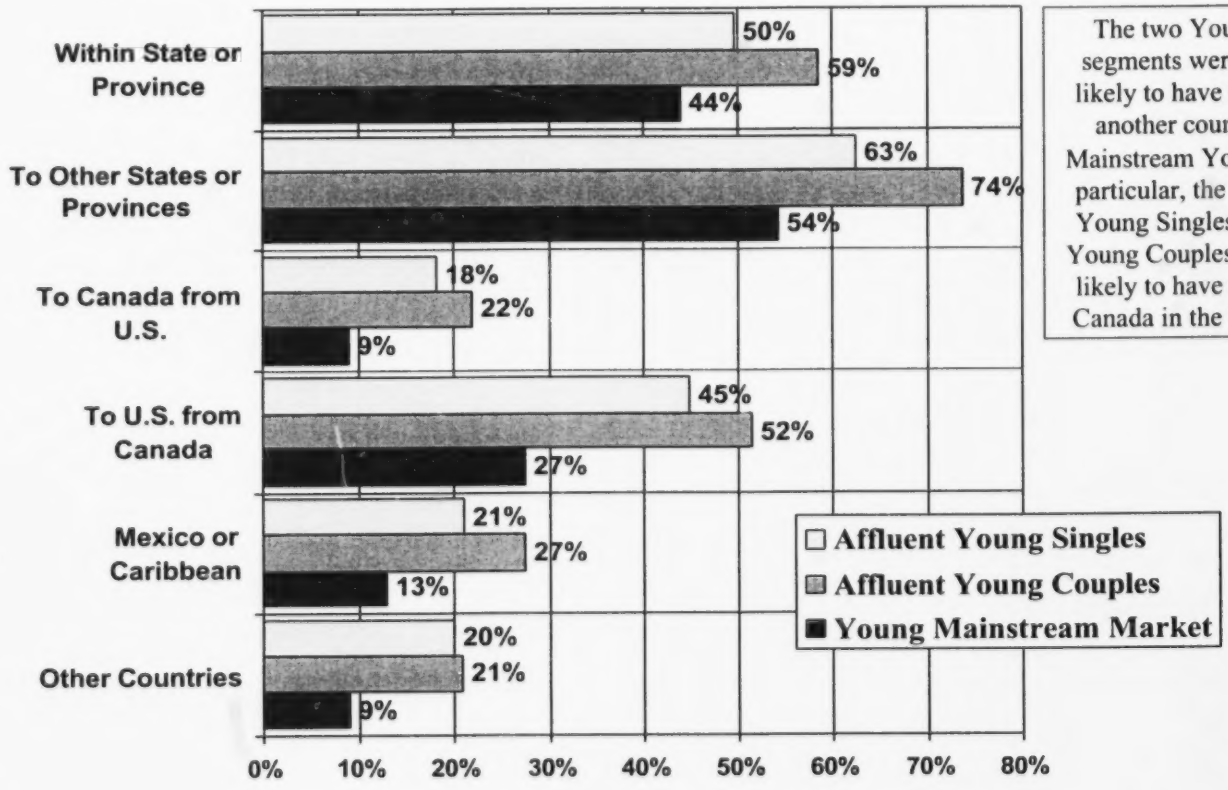
Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years: By Household Income (Canada/U.S.)



The incidence of travel to all destinations during the past two years increased with the level of household income. These differences were especially apparent for travel to other countries.

Total Population (18 Plus)

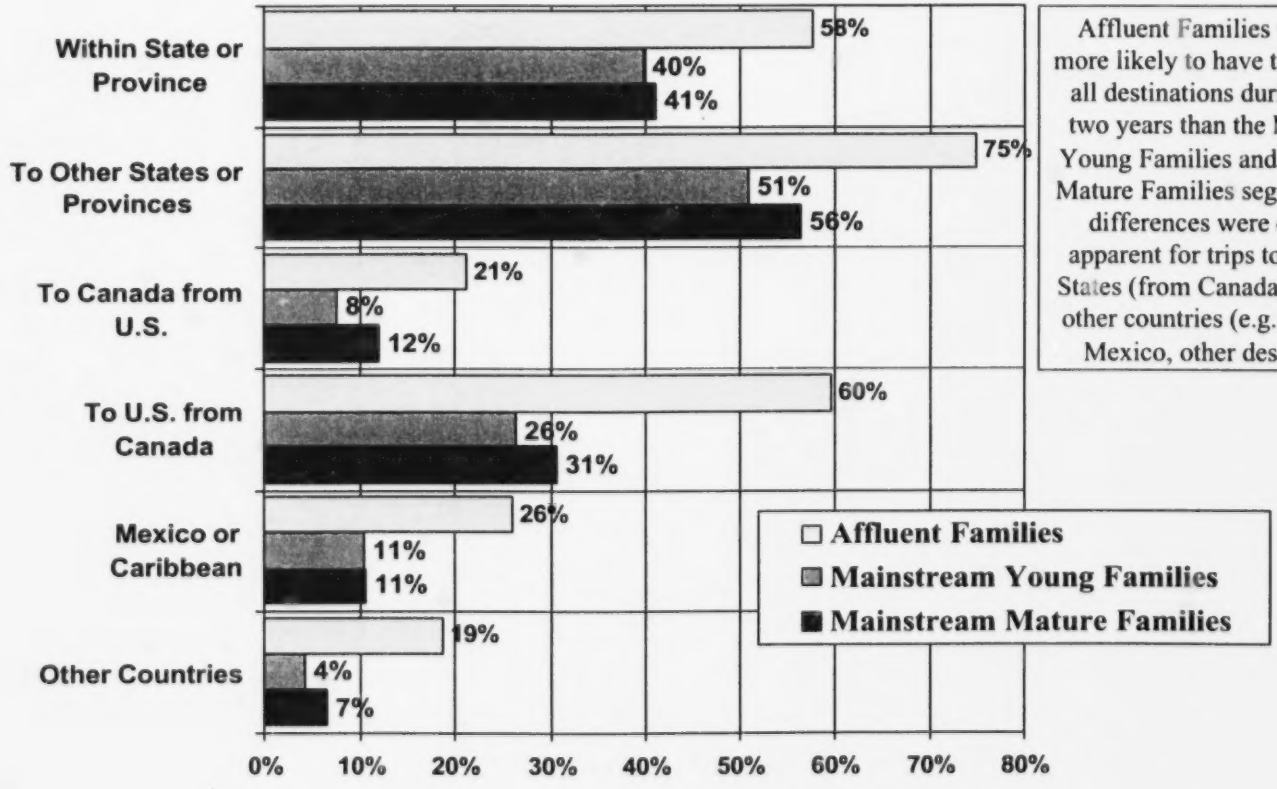
Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years: By Youth Markets (Canada/U.S.)



The two Young Affluent segments were much more likely to have taken a trip to another country than the Mainstream Youth Market. In particular, the U.S. Affluent Young Singles and Affluent Young Couples were twice as likely to have taken a trip to Canada in the last two years.

Total Population (18 Plus)

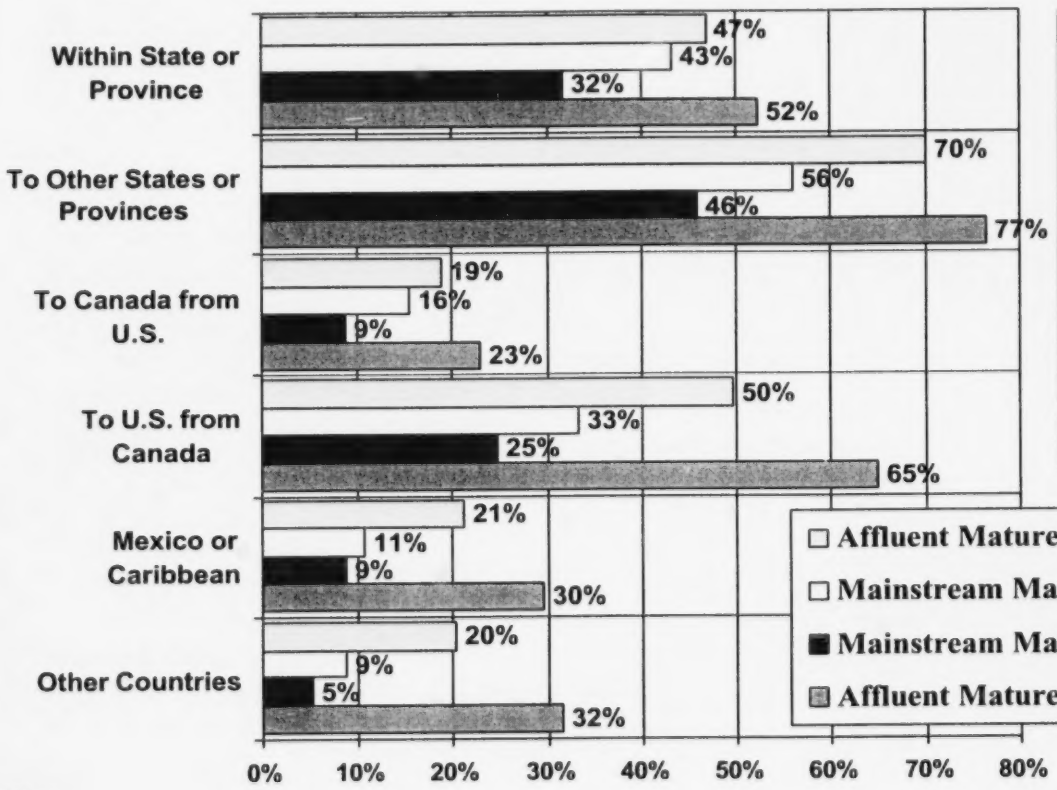
Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years: By Family Markets (Canada/U.S.)



Affluent Families were much more likely to have taken a trip to all destinations during the past two years than the Mainstream Young Families and Mainstream Mature Families segments. These differences were especially apparent for trips to the United States (from Canada) and trips to other countries (e.g., Caribbean/ Mexico, other destinations).

Total Population (18 Plus)

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years: By Mature Markets (Canada/U.S.)

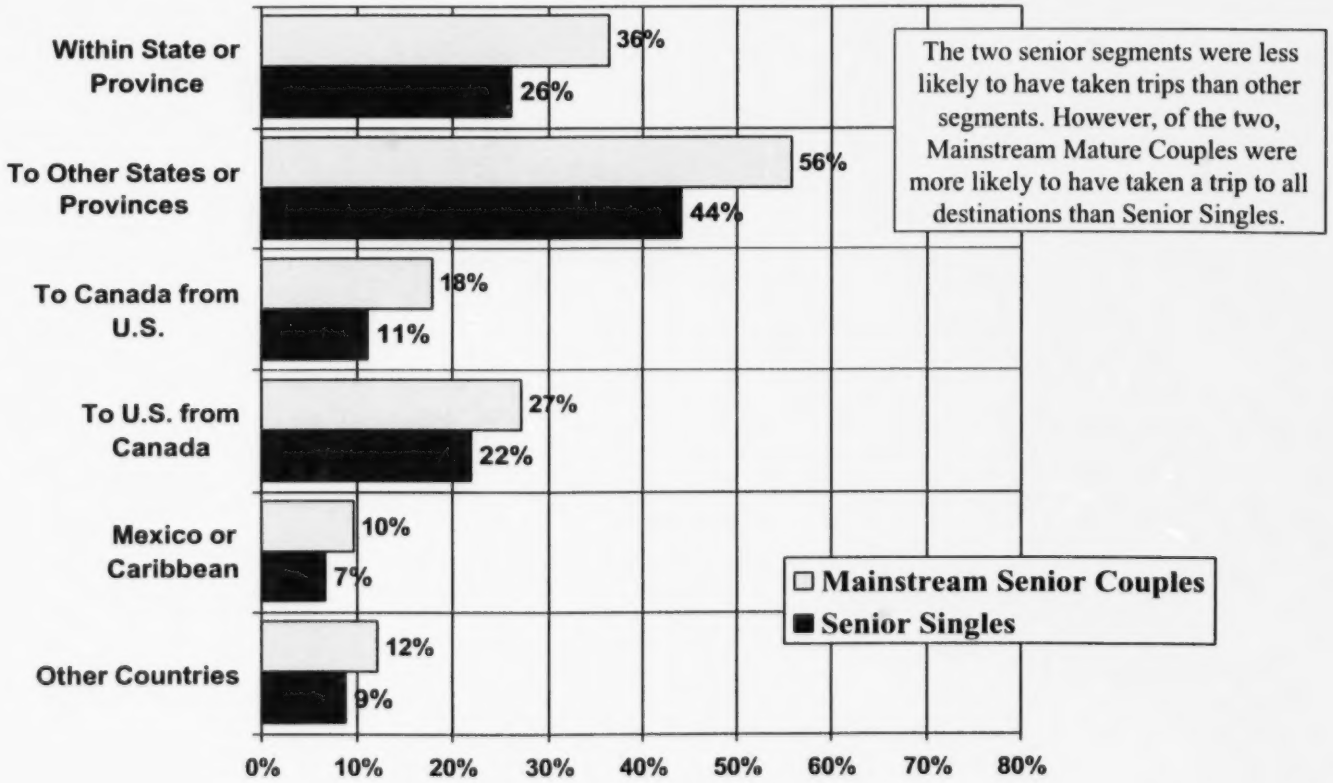


The two mature affluent segments (Affluent Mature Singles, Affluent Mature and Senior Couples) were much more likely to have taken a trip to another country. On the other hand, Mainstream Mature Singles were the least likely to have taken trips to all destinations in the last two years. In terms of trips from the United States to Canada, there was relatively little difference between Affluent Mature Singles, Affluent Mature and Senior Couples, and Mainstream Mature Couples.

Total Population (18 Plus)

Percent Taking Overnight Pleasure Trips to Various Destinations

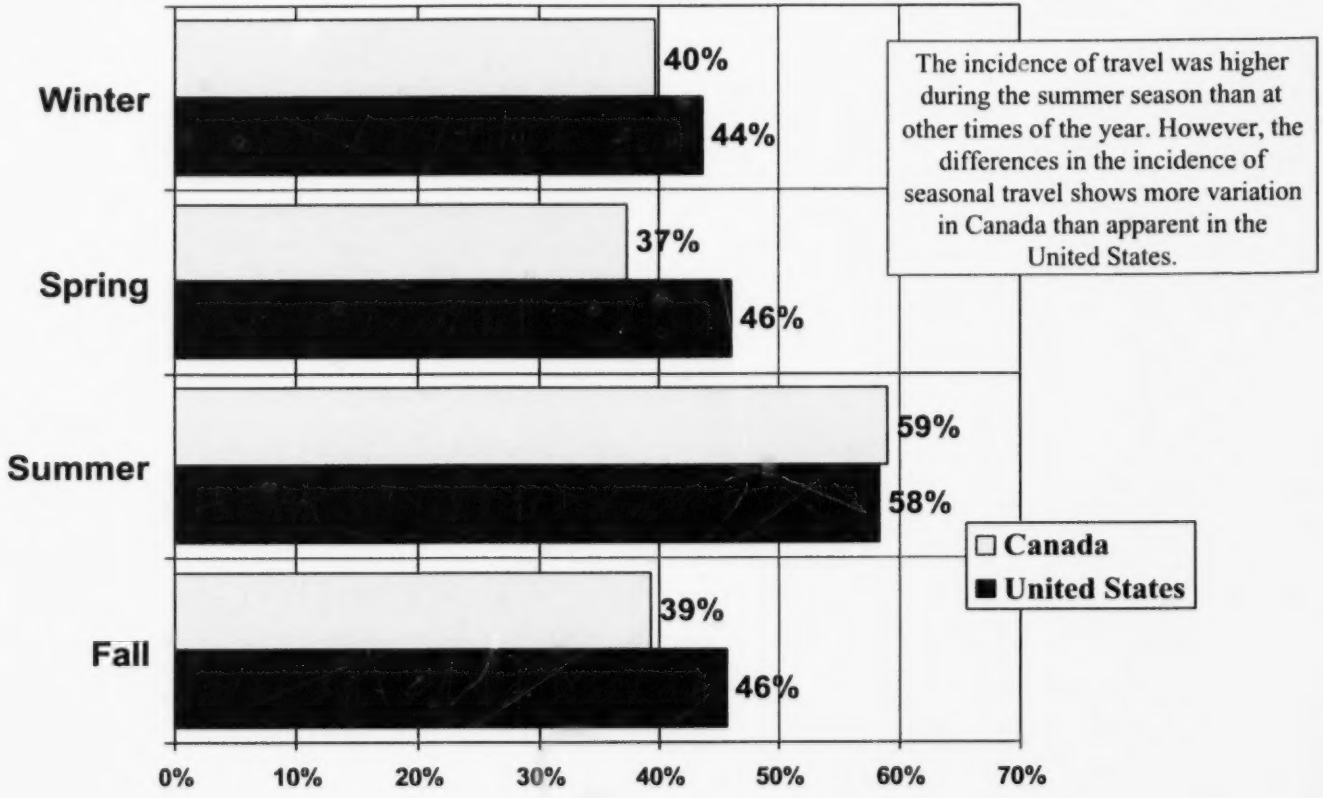
During Past Two Years: By Senior Markets (Canada/U.S.)



Total Population (18 Plus)

Percent Taking Overnight Pleasure Trips By Season

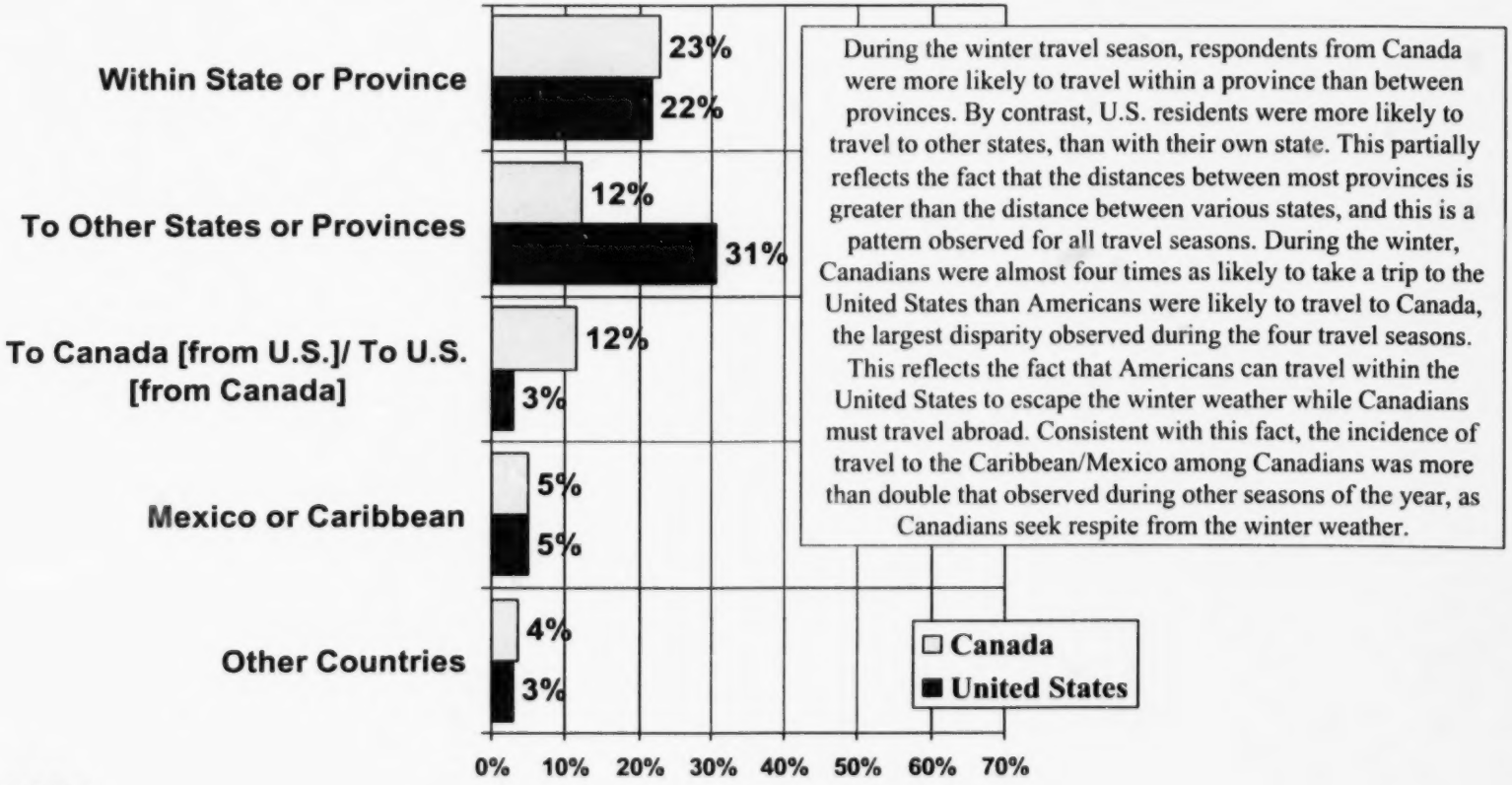
During Past Two Years: Canada versus the United States



Total Population (18 Plus)

Percent Taking Overnight Winter Trips By Destination

During Past Two Years: Canada versus the United States

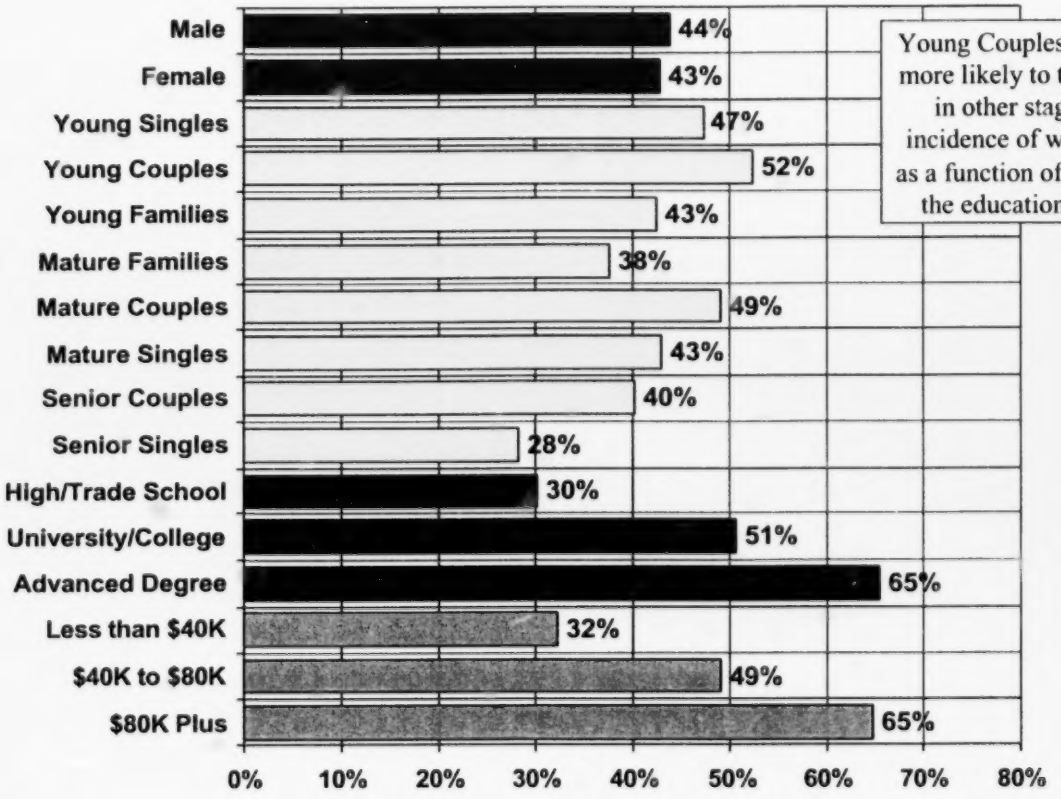


During the winter travel season, respondents from Canada were more likely to travel within a province than between provinces. By contrast, U.S. residents were more likely to travel to other states, than with their own state. This partially reflects the fact that the distances between most provinces is greater than the distance between various states, and this is a pattern observed for all travel seasons. During the winter, Canadians were almost four times as likely to take a trip to the United States than Americans were likely to travel to Canada, the largest disparity observed during the four travel seasons. This reflects the fact that Americans can travel within the United States to escape the winter weather while Canadians must travel abroad. Consistent with this fact, the incidence of travel to the Caribbean/Mexico among Canadians was more than double that observed during other seasons of the year, as Canadians seek respite from the winter weather.

Percent of Total Population (18 Plus) Taking Overnight Winter Pleasure Trips

Winter Travel By Demographics

During Past Two Years: Canada and United States



Young Couples and Mature Couples were more likely to take winter trips than those in other stages of the lifecycle. The incidence of winter travel also increased as a function of the household income and the education level of the respondent.

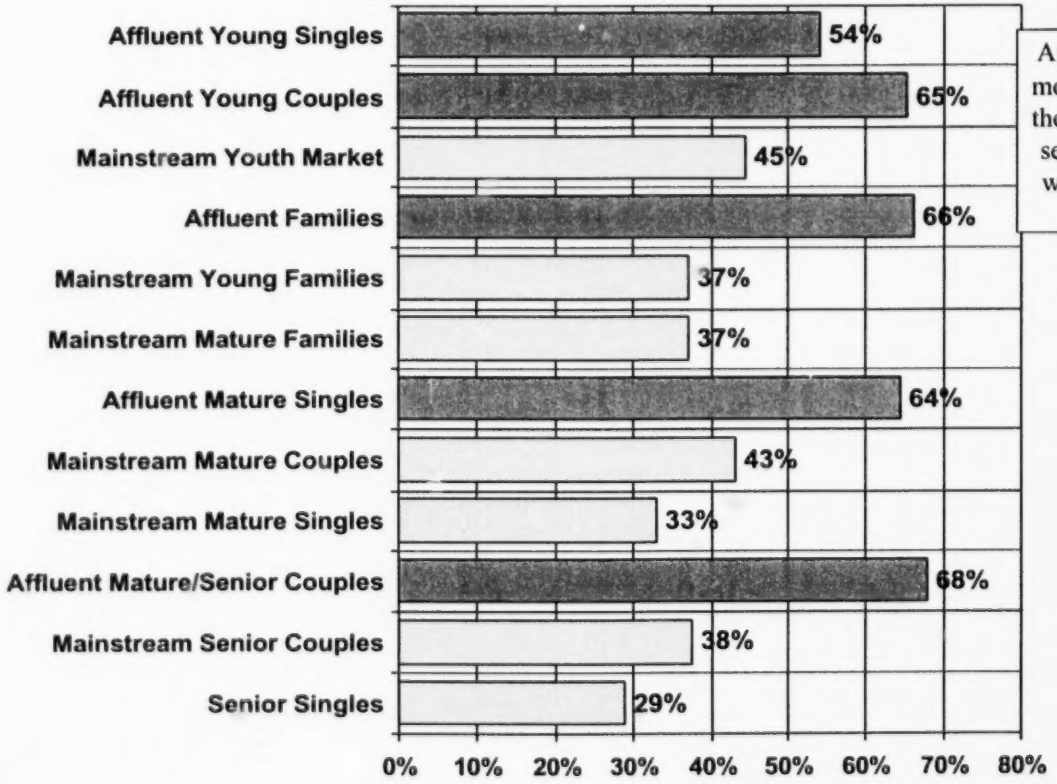
TAMS
Travel Activities & Motivation Survey

Lang

Percent of Total Population (18 Plus) Taking Overnight Winter Pleasure Trips

Winter Travel By Market Segment

During Past Two Years: Canada and United States

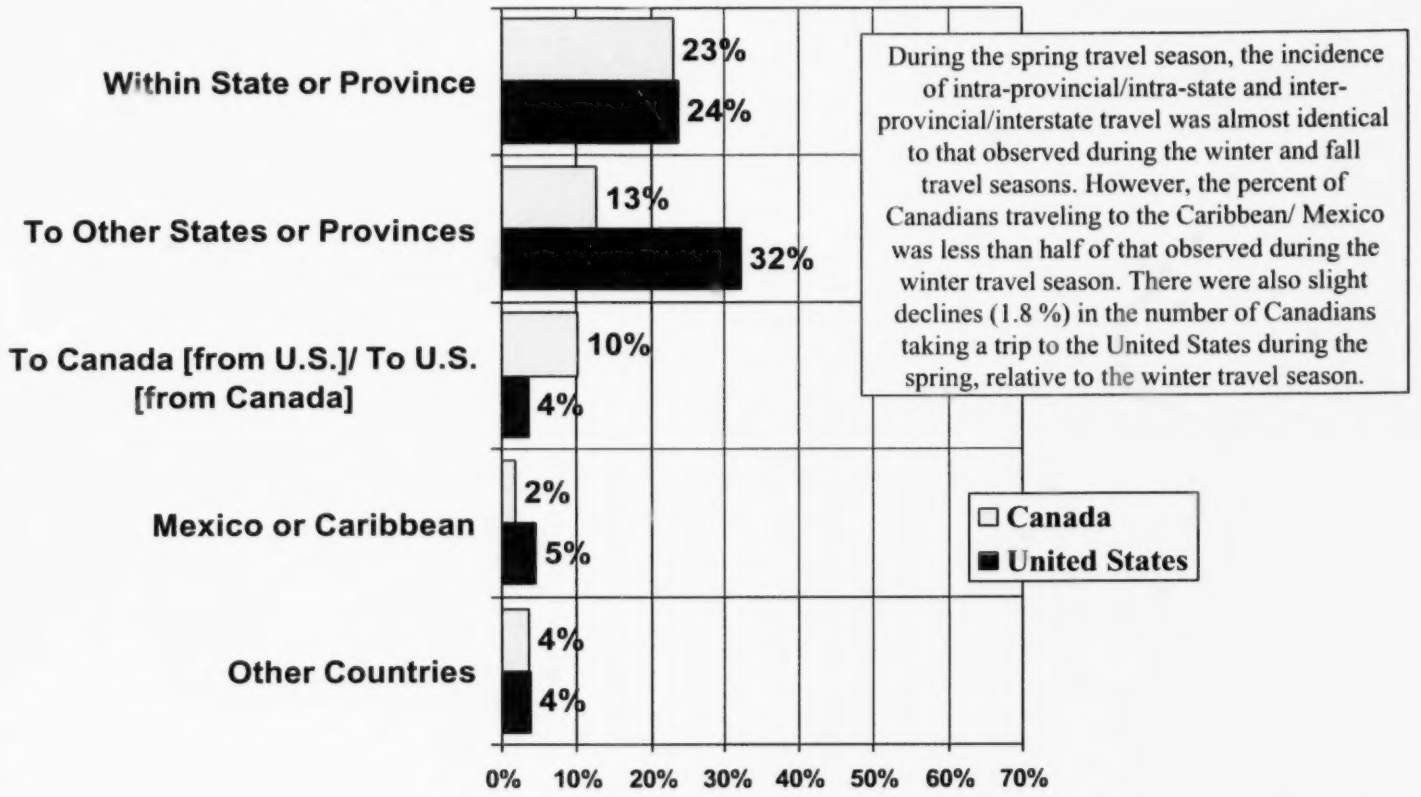


Affluent segments were much more likely to take trips during the winter than the mainstream segments. The Senior Singles were the least likely to take a trip during the winter.

Percent of Total Population (18 Plus) Taking Overnight Spring Pleasure Trips

Spring Travel By Destination

During Past Two Years: Canada versus United States

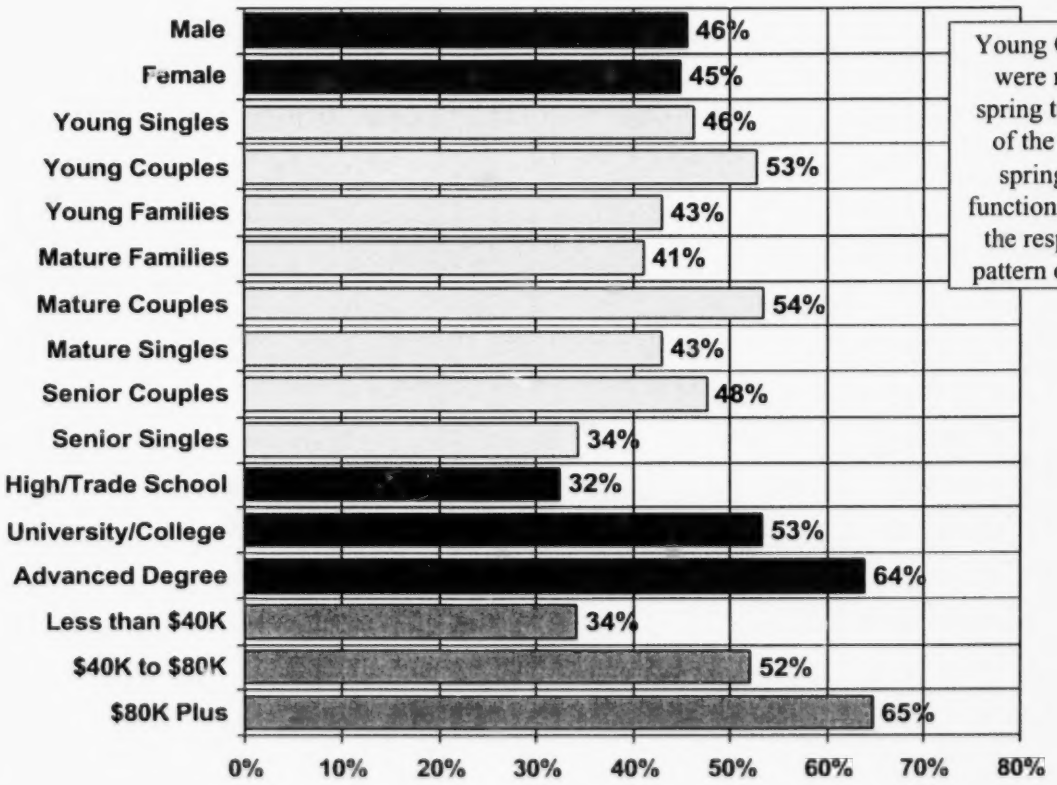


During the spring travel season, the incidence of intra-provincial/intra-state and inter-provincial/interstate travel was almost identical to that observed during the winter and fall travel seasons. However, the percent of Canadians traveling to the Caribbean/ Mexico was less than half of that observed during the winter travel season. There were also slight declines (1.8 %) in the number of Canadians taking a trip to the United States during the spring, relative to the winter travel season.

Percent of Total Population (18 Plus) Taking Overnight Spring Pleasure Trips

Spring Travel By Demographics

During Past Two Years: Canada and United States



Young Couples and Mature Couples were more likely to have taken a spring trip than those in other stages of the lifecycle. The incidence of spring travel also increased as a function of the household income and the respondent's education level, a pattern observed for all four seasons.

TAMS
Travel Activities & Motivation Survey

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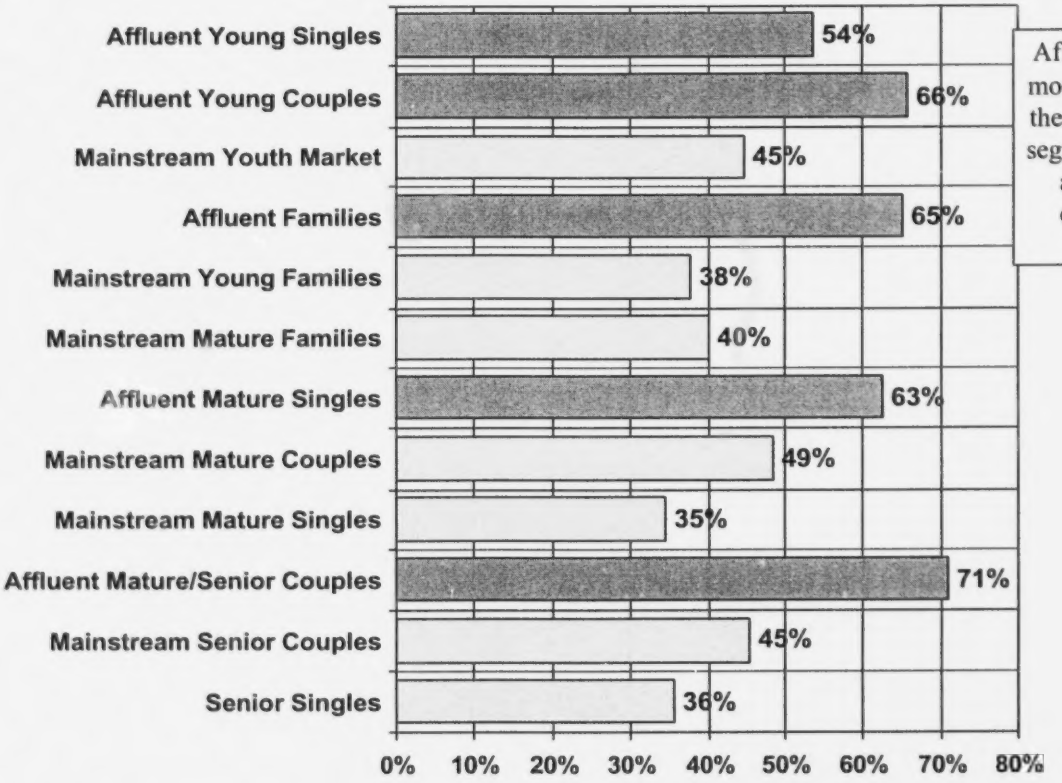
RESEARCH

Percent of Total Population (18 Plus) Taking Overnight Spring Pleasure Trips

Spring Travel By Market Segment

During Past Two Years: Canada and United States

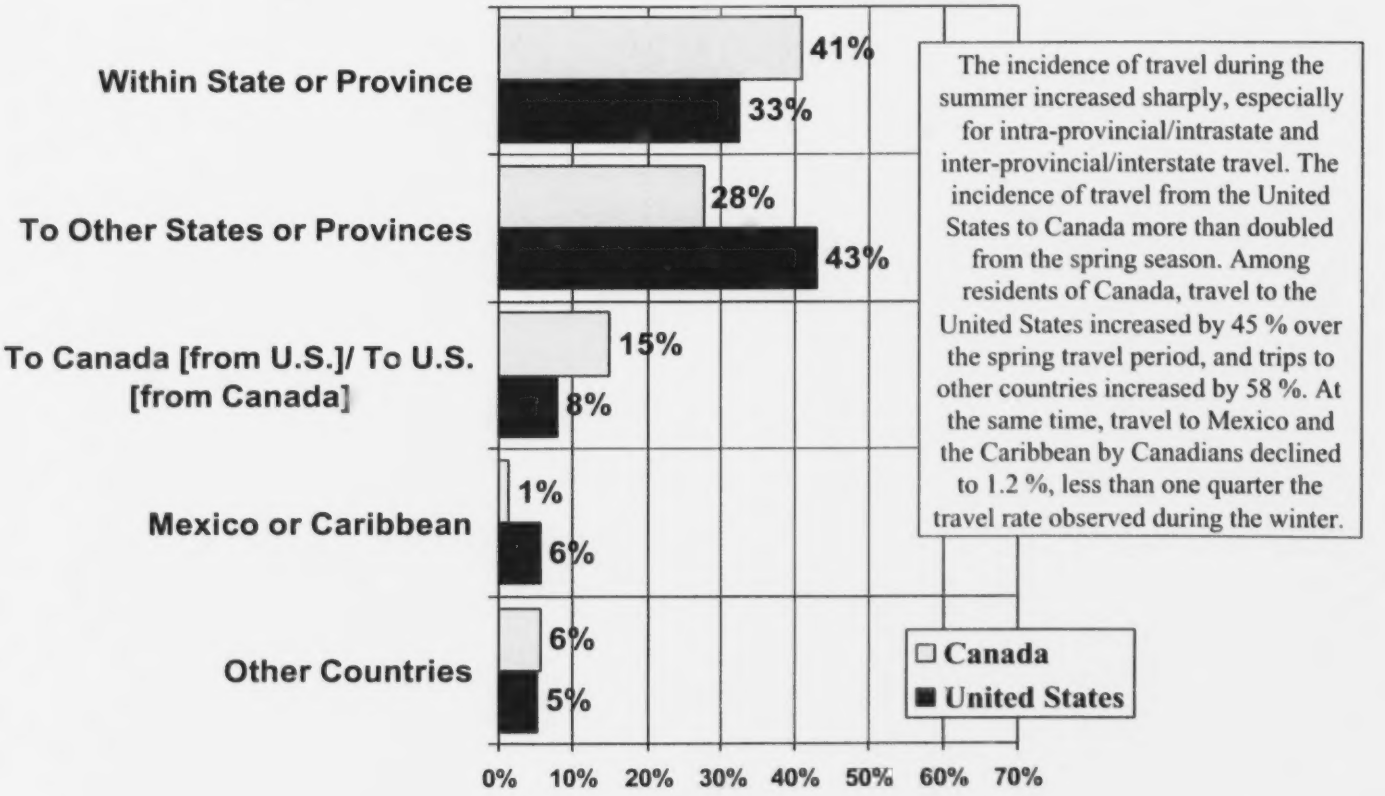


Affluent segments were much more likely to take trips during the spring than the mainstream segments. The Affluent Mature and Senior Couples were especially likely to travel during the spring.

Percent of Total Population (18 Plus) Taking Overnight Summer Pleasure Trips

Summer Travel By Destination

During Past Two Years: Canada versus the United States

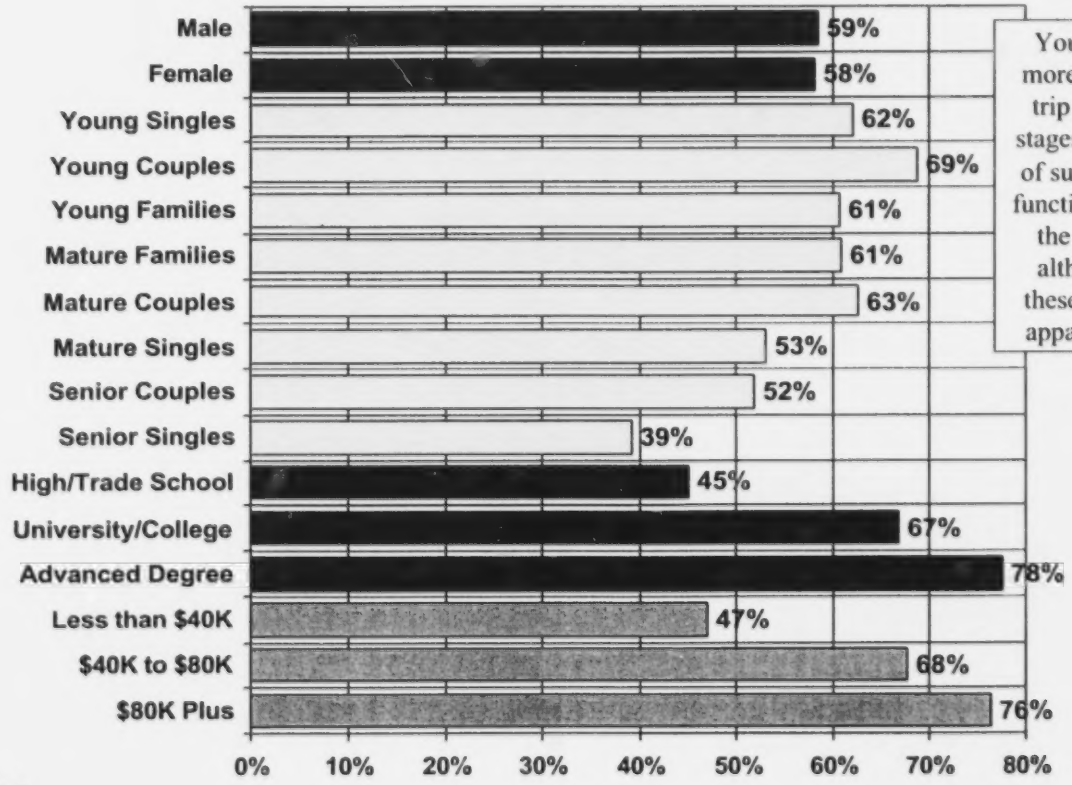


The incidence of travel during the summer increased sharply, especially for intra-provincial/intrastate and inter-provincial/interstate travel. The incidence of travel from the United States to Canada more than doubled from the spring season. Among residents of Canada, travel to the United States increased by 45 % over the spring travel period, and trips to other countries increased by 58 %. At the same time, travel to Mexico and the Caribbean by Canadians declined to 1.2 %, less than one quarter the travel rate observed during the winter.

Percent of Total Population (18 Plus) Taking Overnight Summer Pleasure Trips

Summer Travel By Demographics

During Past Two Years: Canada and United States

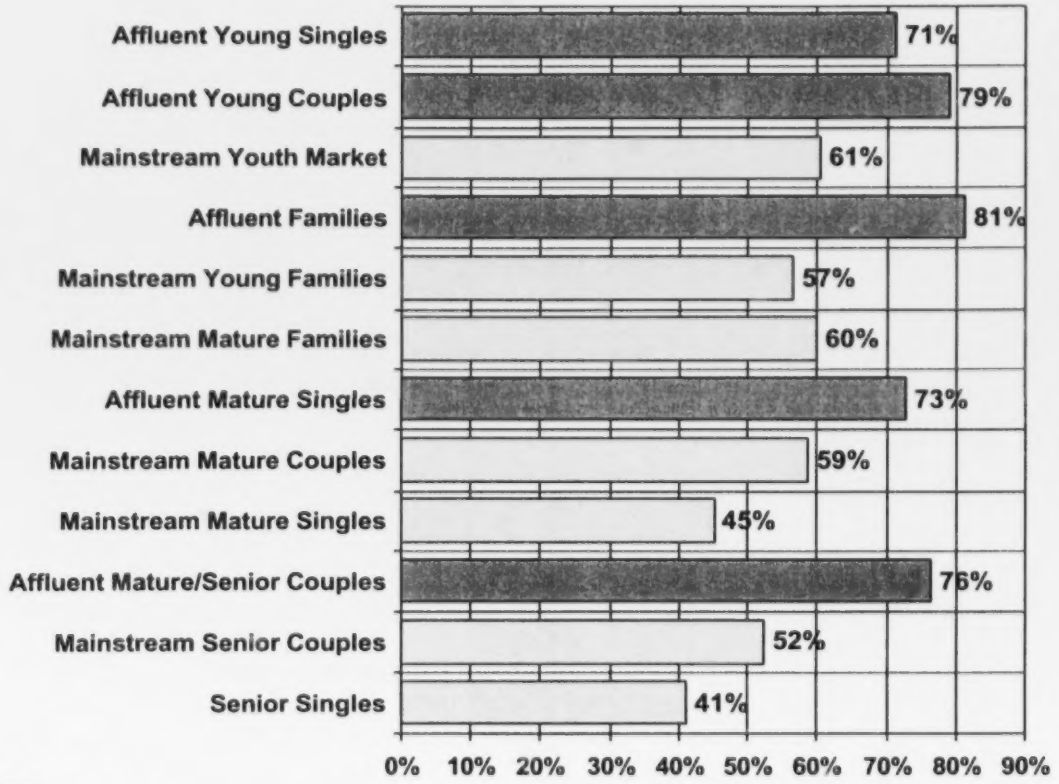


Young and family segments were more likely to have taken a summer trip than those in the more mature stages of the lifecycle. The incidence of summer travel also increased as a function of the household income and the respondent's education level, although the differences between these sectors of the market was less apparent than during other seasons.

Percent of Total Population (18 Plus) Taking Overnight Summer Pleasure Trips

Summer Travel By Market Segment

During Past Two Years: Canada and United States

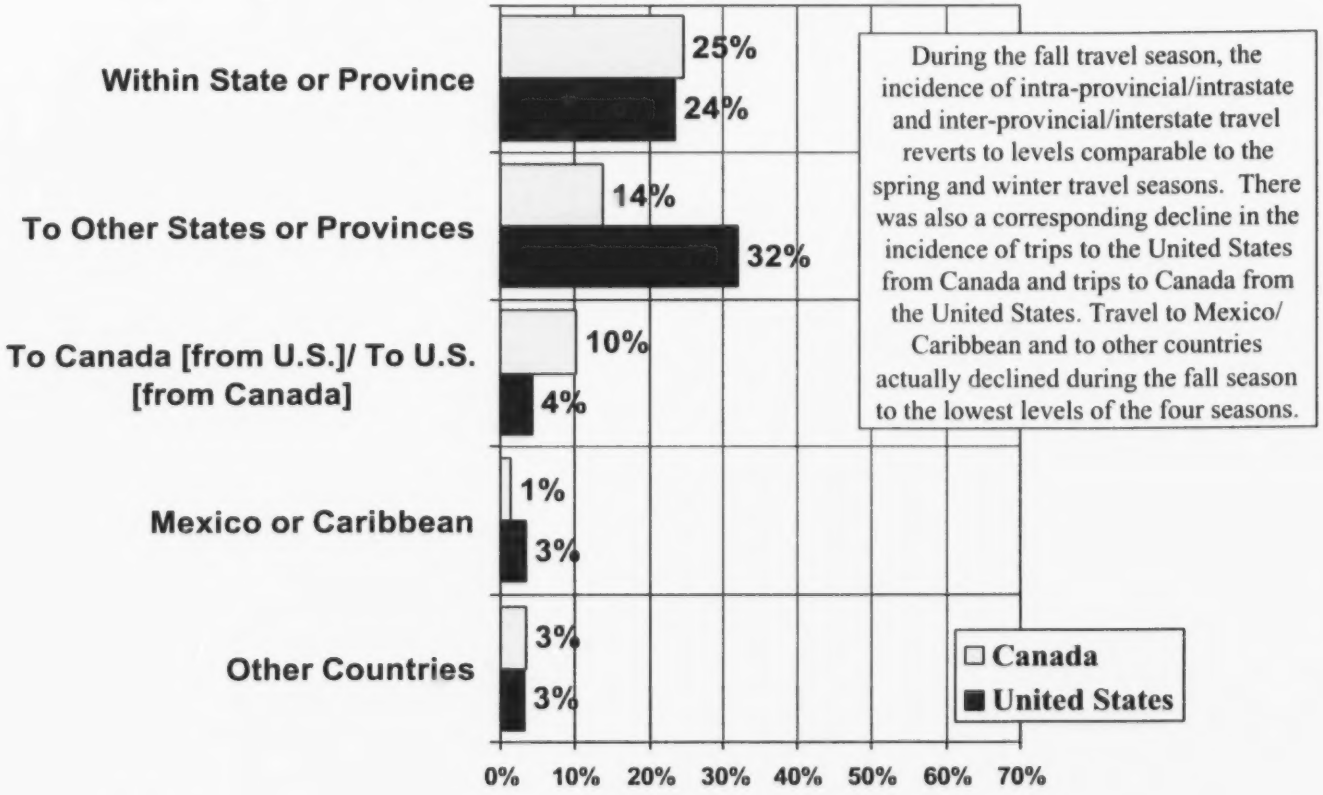


The affluent segments were much more likely to take trips during the summer than the mainstream segments. However, the differences between the segments was less than what was observed during other seasons of the year. As result, the strategic importance of the mainstream segments, and especially the Mainstream Young Families and Mature Couples segments, increases considerably during the summer travel season.

Percent of Total Population (18 Plus) Taking Overnight Fall Pleasure Trips

Fall Travel By Destination

During Past Two Years: Canada versus the United States

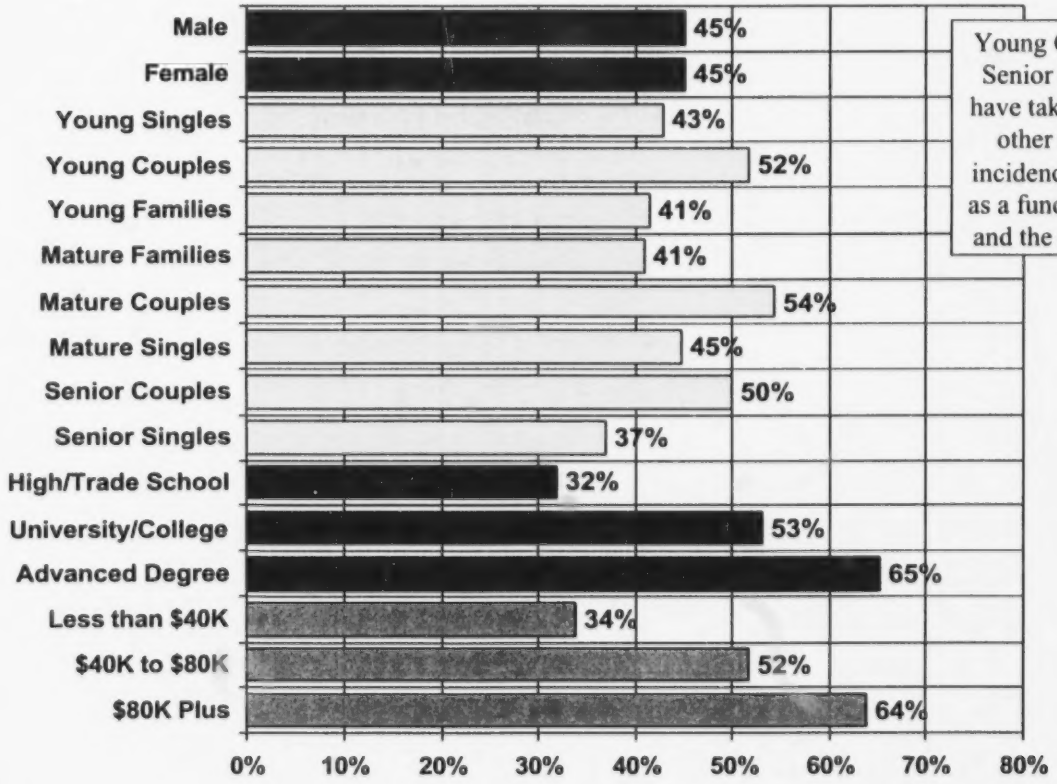


During the fall travel season, the incidence of intra-provincial/intrastate and inter-provincial/interstate travel reverts to levels comparable to the spring and winter travel seasons. There was also a corresponding decline in the incidence of trips to the United States from Canada and trips to Canada from the United States. Travel to Mexico/ Caribbean and to other countries actually declined during the fall season to the lowest levels of the four seasons.

Percent of Total Population (18 Plus) Taking Overnight Fall Pleasure Trips

Fall Travel By Demographics

During Past Two Years: Canada and United States

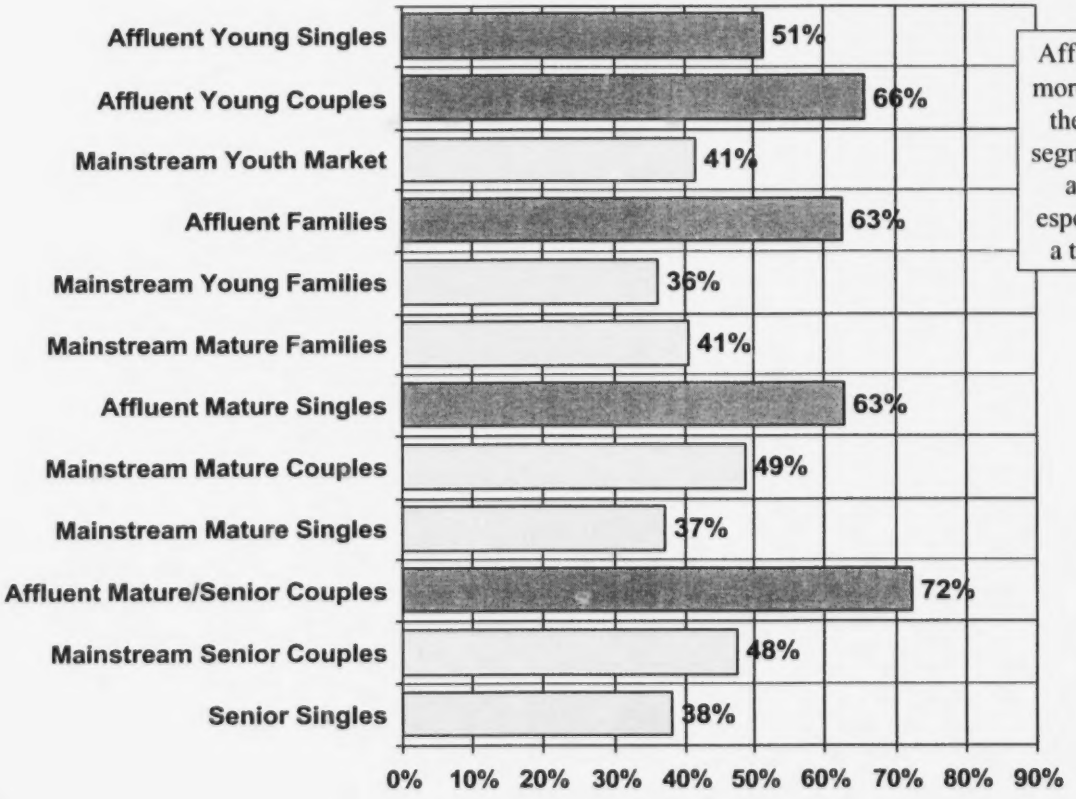


Young Couples, Mature Couples and Senior Couples were more likely to have taken a fall trip than those in the other stages of the lifecycle. The incidence of fall travel also increased as a function of the household income and the respondent's education level.

Percent of Total Population (18 Plus) Taking Overnight Fall Pleasure Trips

Fall Travel By Market Segment

During Past Two Years: Canada and United States

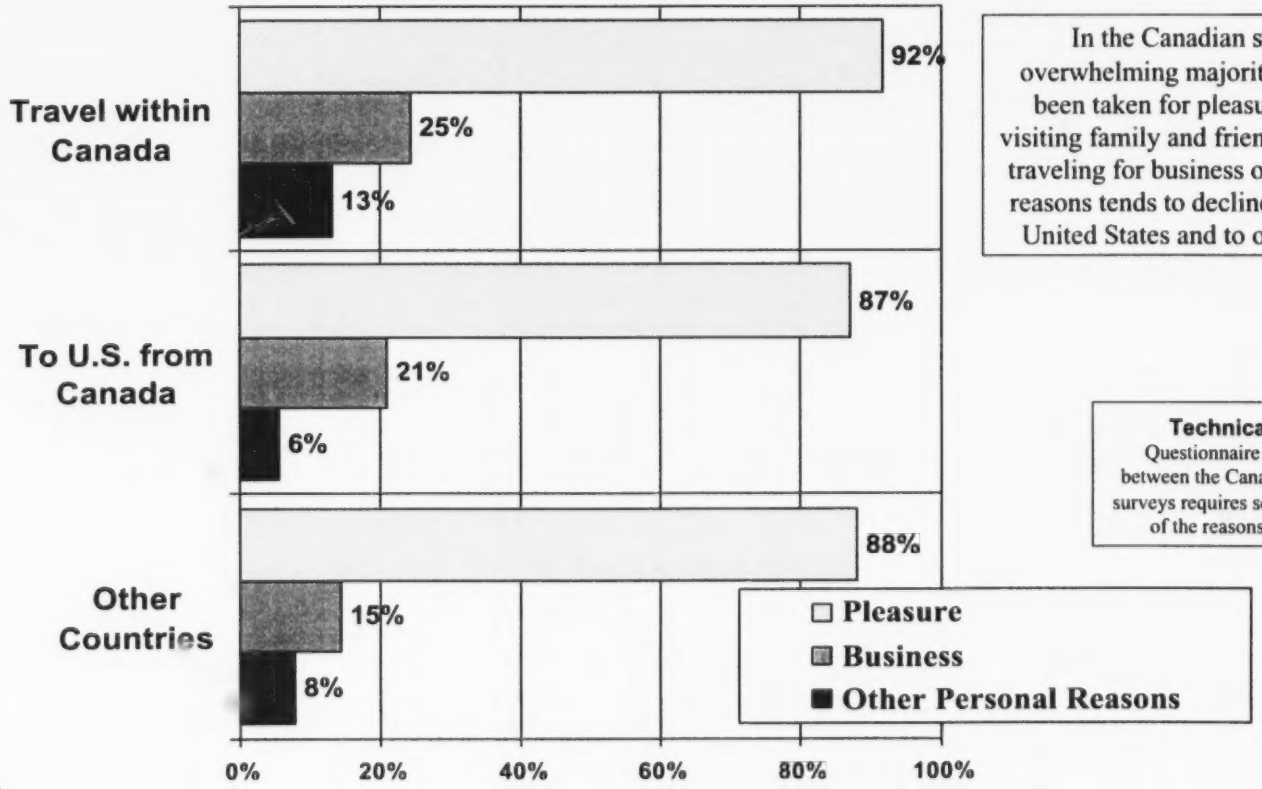


Affluent segments were much more likely to take trips during the fall than the mainstream segments. The Affluent Mature and Senior Couples were especially likely to have taken a trip during the fall season.

Reasons for Travel Among Those (18 Plus) Taking Overnight Trips

By Destination: Canadians

Base: Canadians (18 Plus) Taking an Overnight Trip During Past Two Years



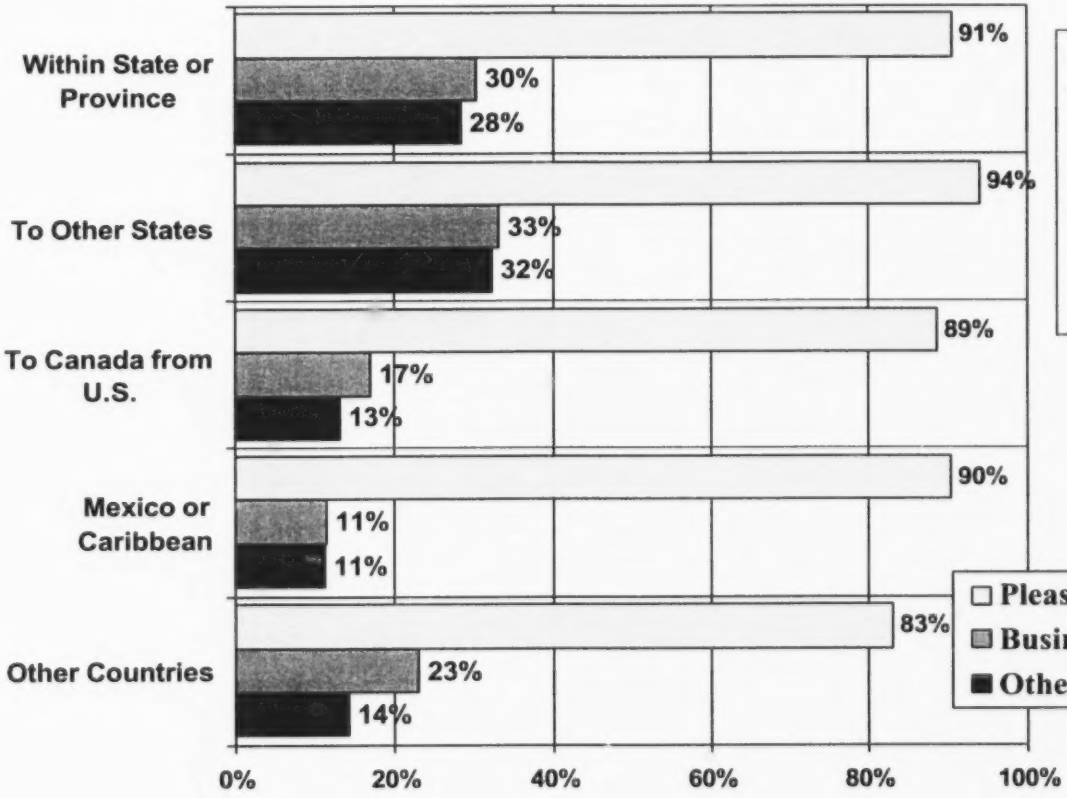
In the Canadian survey, the overwhelming majority of trips have been taken for pleasure (including visiting family and friends). The percent traveling for business or other personal reasons tends to decline for trips to the United States and to other countries.

Technical Note
Questionnaire differences between the Canadian and U.S. surveys requires separate analysis of the reasons for travel.

Reasons for Travel Among Those (18 Plus) Taking Overnight Trips

By Destination: Americans

Base: Americans (18 Plus) Taking an Overnight Trip During Past Two Years



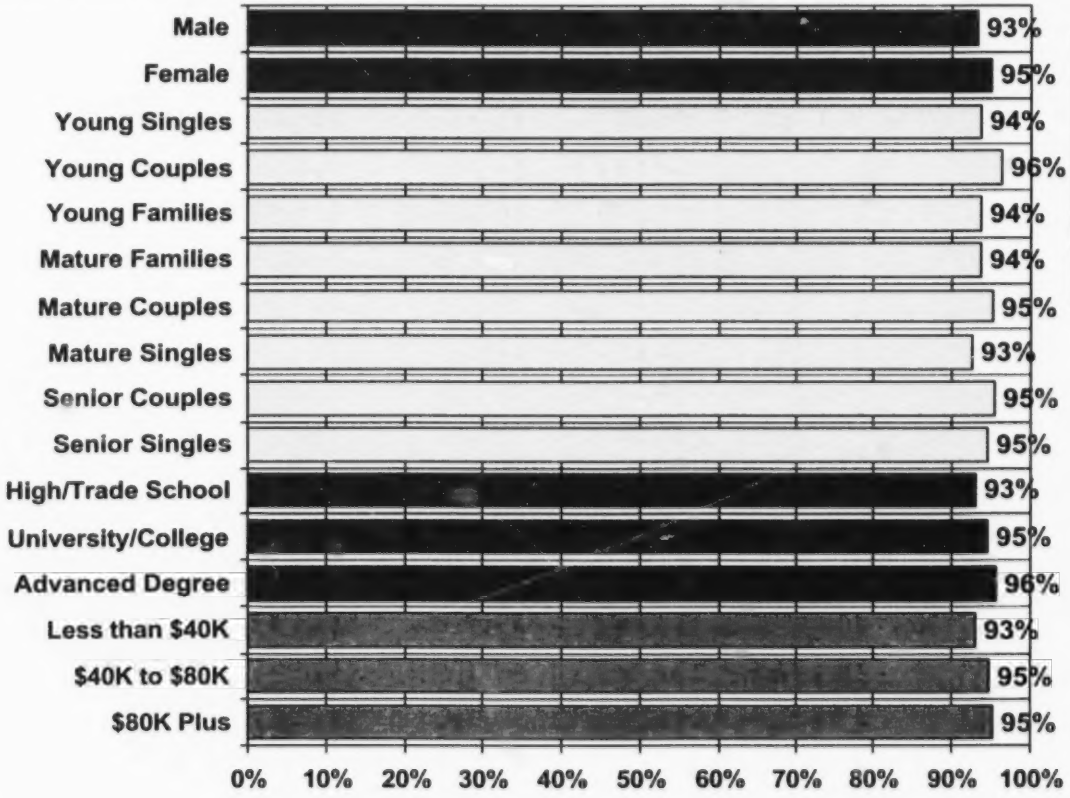
In the U.S. survey, the overwhelming majority of trips were also taken for pleasure (including visiting family and friends). The percent traveling for business or other personal reasons tended to decline for trips to Canada and other countries.

Technical Note
Questionnaire differences between the Canadian and U.S. surveys requires separate analysis of the reasons for travel.

Percent of Travelers (18 Plus) Taking At Least One Overnight Trip

Mainly for Pleasure

Base: Those Taking an Overnight Trip in Past Two Years: Canada and United States

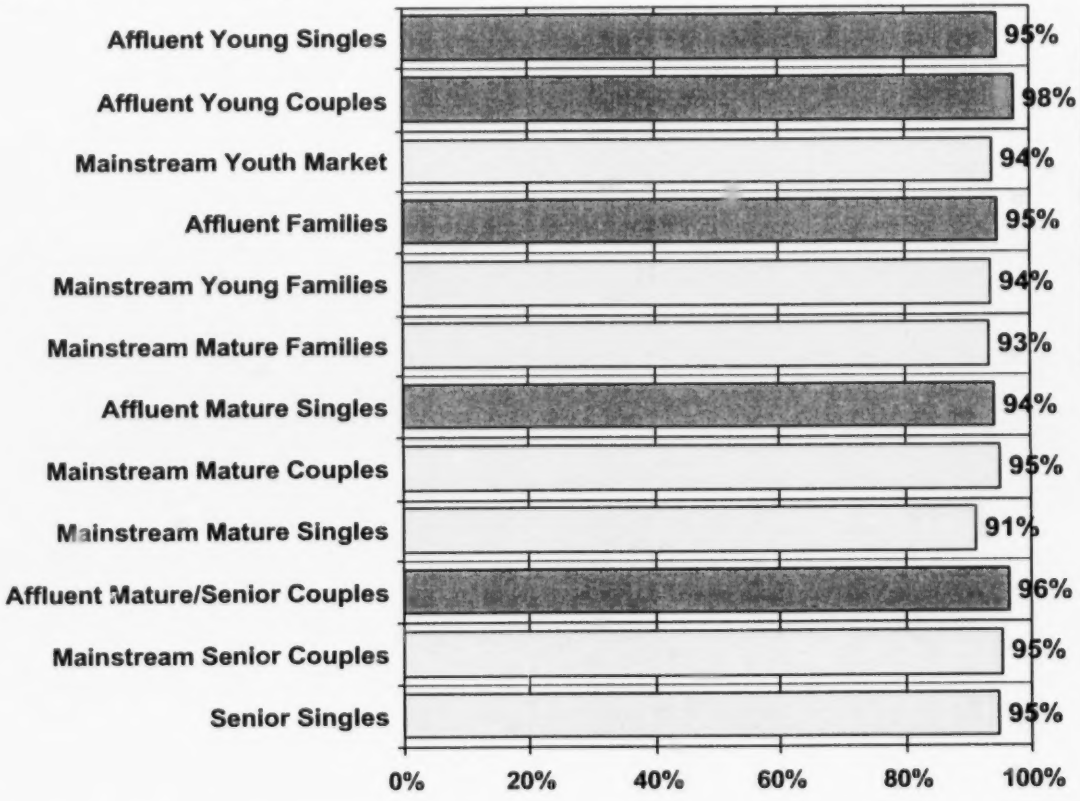


There was no difference in the likelihood of taking a trip "mainly for pleasure" (including visiting family and friends) by respondent gender, lifecycle stage, education of the respondent or household income.

Percent of Travelers (18 Plus) Taking At Least One Overnight Trip

Mainly for Pleasure

Base: Those Taking an Overnight Trip in Past Two Years: Canada and United States

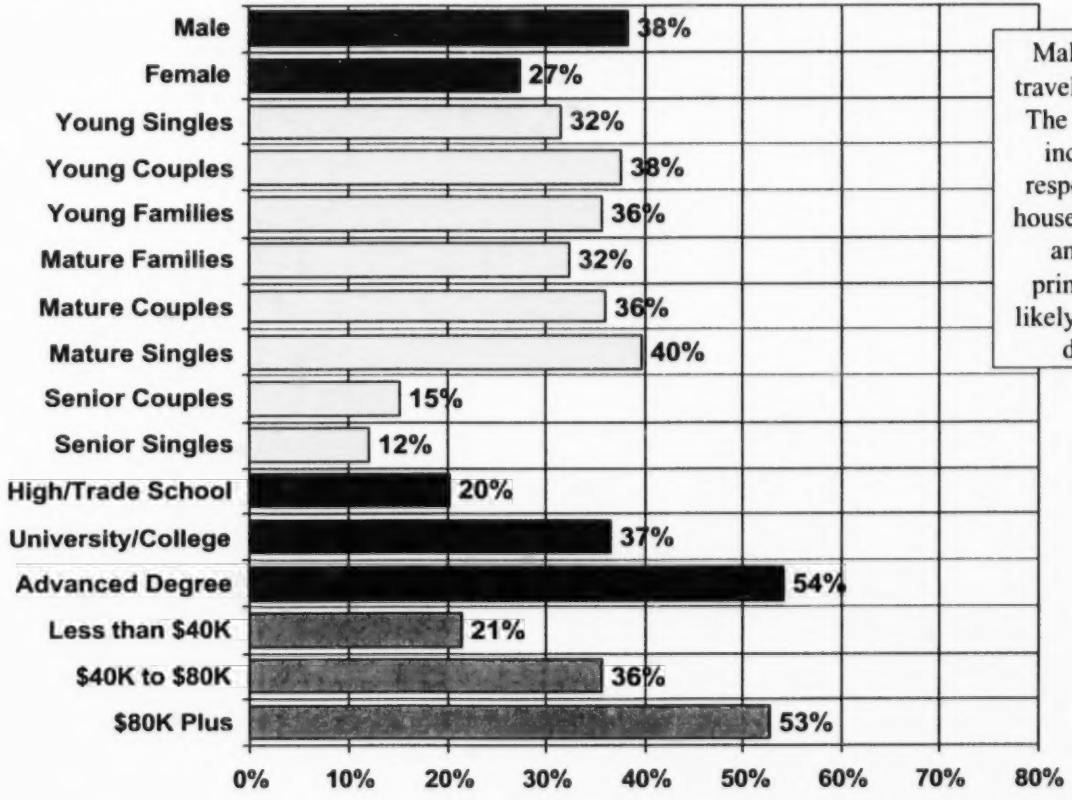


There was no difference in the likelihood of taking a trip "mainly for pleasure" (including visiting family and friends) by market segment with the exception of the Mainstream Mature Singles, who were slightly less likely to have taken their trip for pleasure.

Percent of Travelers (18 Plus) Taking At Least One Overnight Trip

Mainly for Business

Base: Those Taking an Overnight Trip in Past Two Years: Canada and United States

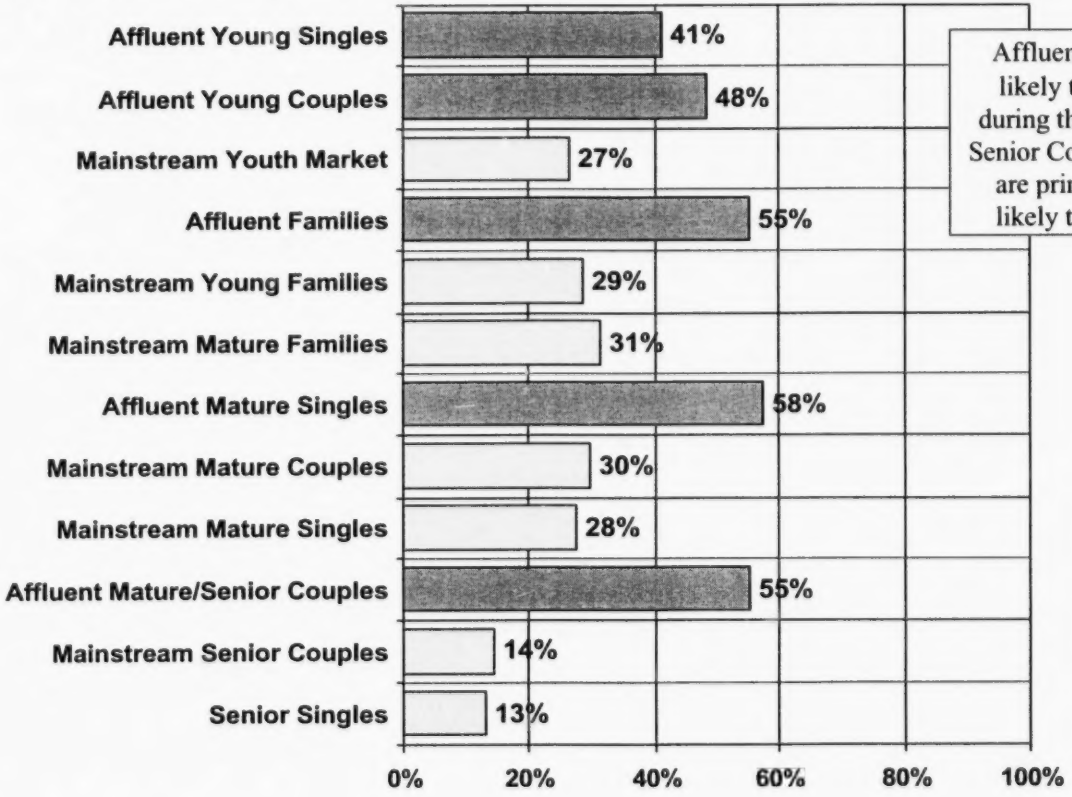


Males were more likely to have traveled for business than females. The likelihood of business travel increased as a function of the respondent's education level and household income. Senior Couples and Senior Singles, who are primarily retired, were the least likely to have taken a business trip during the past two years.

Percent of Travelers (18 Plus) Taking At Least One Overnight Trip

Mainly for Business

Base: Those Taking an Overnight Trip in Past Two Years: Canada and United States

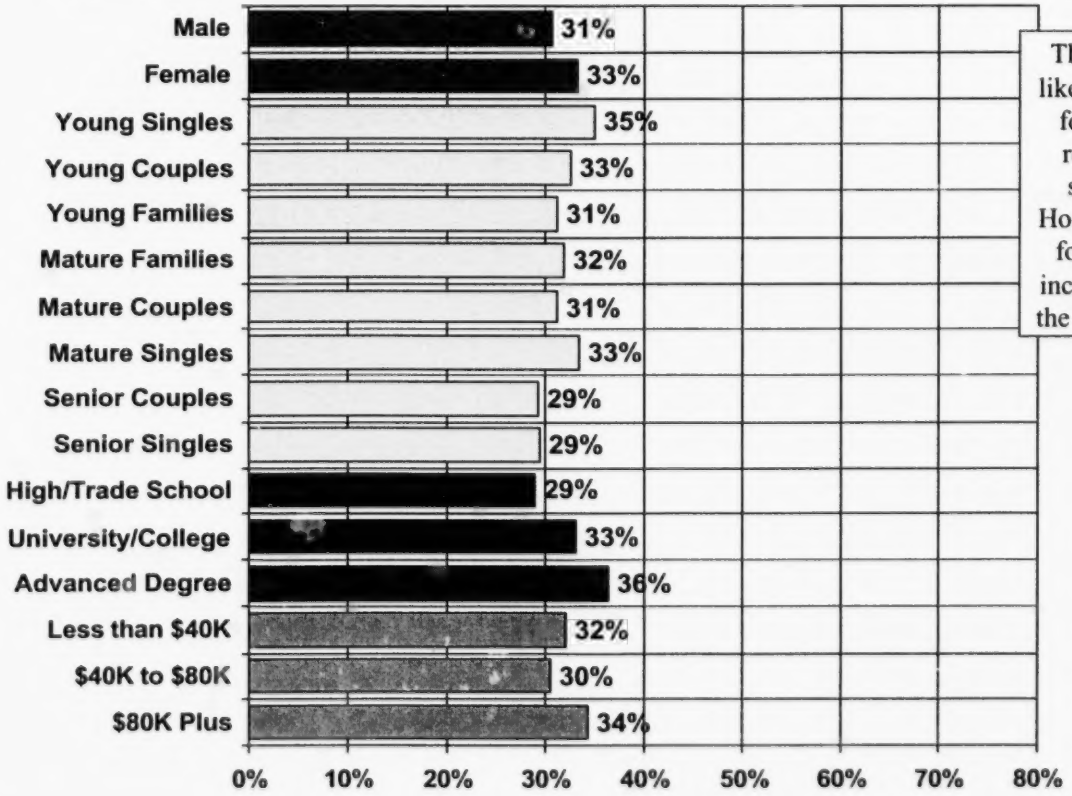


Affluent segments were much more likely to have taken a business trip during the past two years. Mainstream Senior Couples and Senior Singles, who are primarily retired, were the least likely to have taken a business trip.

Percent of Travelers (18 Plus) Taking At Least One Overnight Trip

For Other Personal Reasons

Base: Those Taking an Overnight Trip in Past Two Years: Canada and United States

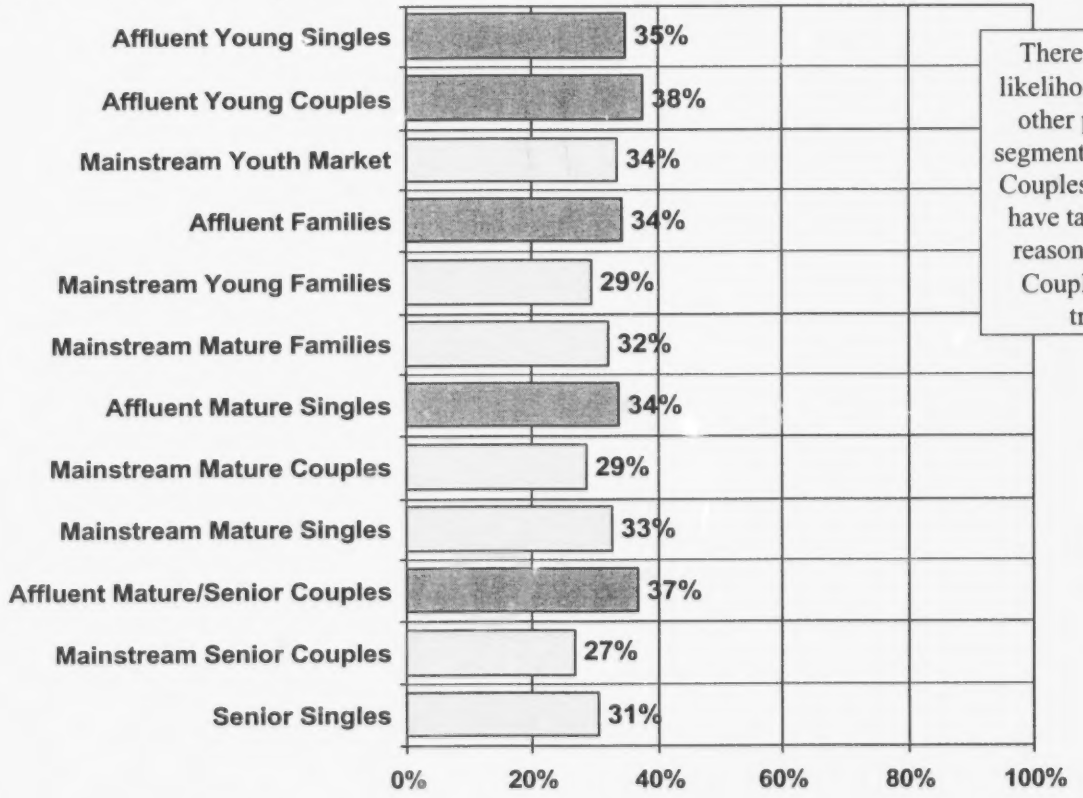


There was no difference in the likelihood that the trip was taken for other personal reasons by respondent gender, lifecycle stage or household income. However, the incidence of travel for other personal reasons did increase slightly as a function of the respondent's education level.

Percent of Travelers (18 Plus) Taking At Least One Overnight Trip

For Other Personal Reasons

Base: Those Taking an Overnight Trip in Past Two Years: Canada and United States



There was little difference in the likelihood that the trip was taken for other personal reasons by market segment. Affluent Mature and Senior Couples were slightly more likely to have taken a trip for other personal reasons, while Mainstream Senior Couples were less likely to have traveled for this reason.

Section Three

Travel to Canada

From the United States

Travel to Canada From the United States

- Key Findings -

13.1 % of United States residents (18 Plus) have taken at least one overnight pleasure trip to Canada during the last two years. The most frequently visited provinces were Ontario (7.2 % of Americans visiting at least one time), British Columbia (4.0 %) and Quebec

(3.3 %).

The U.S. markets with the highest incidence of travel to Canada are primarily situated along the Canadian border and include urban centres such as Rochester, Seattle, Buffalo, Detroit, Cleveland and Toledo. However, Detroit, Boston, Chicago, New York City and Seattle are the urban centres which generate the largest number of trips to Canada. Proximity dictates the prime markets for each province.

Travel to Canada is primarily concentrated in the summer months with 7.8 % of U.S. residents taking at least one summer trip to Canada in the last two years. Travel to Canada is slightly higher (4.4 %) during the fall, than during the spring (3.5 %) and winter (3.0 %) travel seasons. The incidence of travel by season varies by region of the United States with travel during the shoulder seasons more common among the border states. Long haul travel from more distant U.S. markets is concentrated in the summer.

As with travel patterns in general, travel to Canada increased with the education level of the respondent and the household income. This was especially the case for business travel.

Travel to Canada From the United States

- Research Method -

Particular attention was given in the telephone survey to assess travel by U.S. respondents to Canada during the past two years.

Respondents were asked:

- How many overnight trips they had taken in the last two years to each province
- What season of the year they had taken trips to Canada
- Why they had taken these trips (e.g., mainly for pleasure including trips to visit friends and relatives, mainly for business, mainly for other personal reasons or for some other reason)

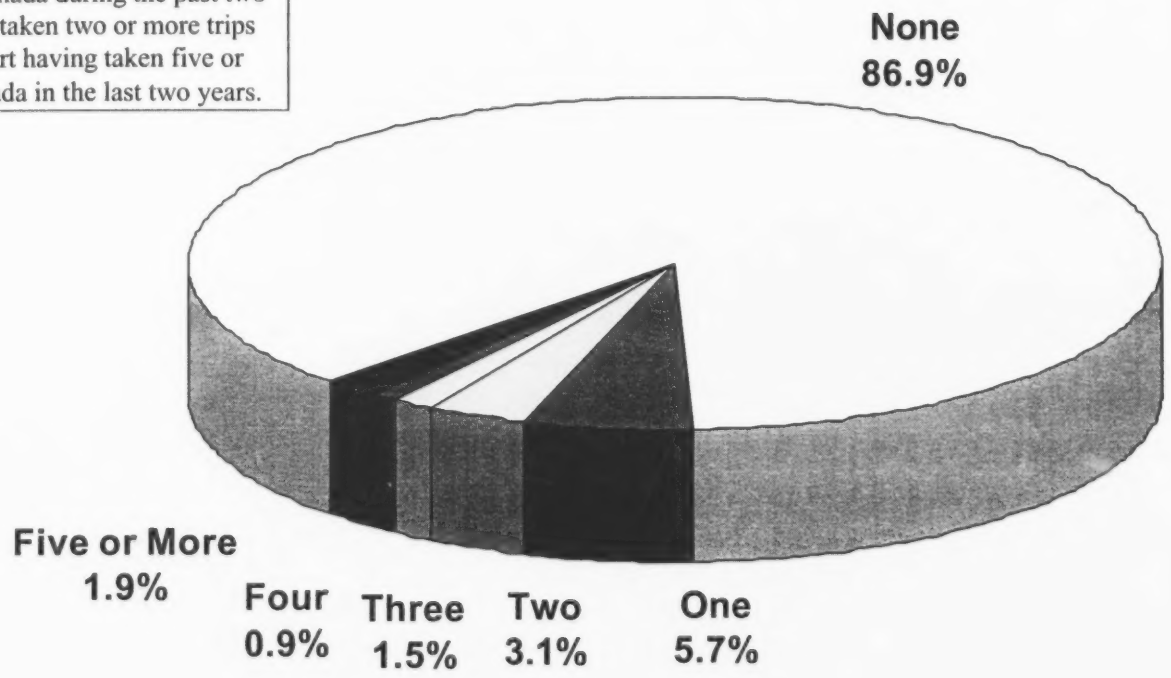
This section of the overview report explores U.S. travel to Canada.

U.S. Population (18 Plus)

Number of Trips Taken to Canada from U.S.A.

During Past Two Years

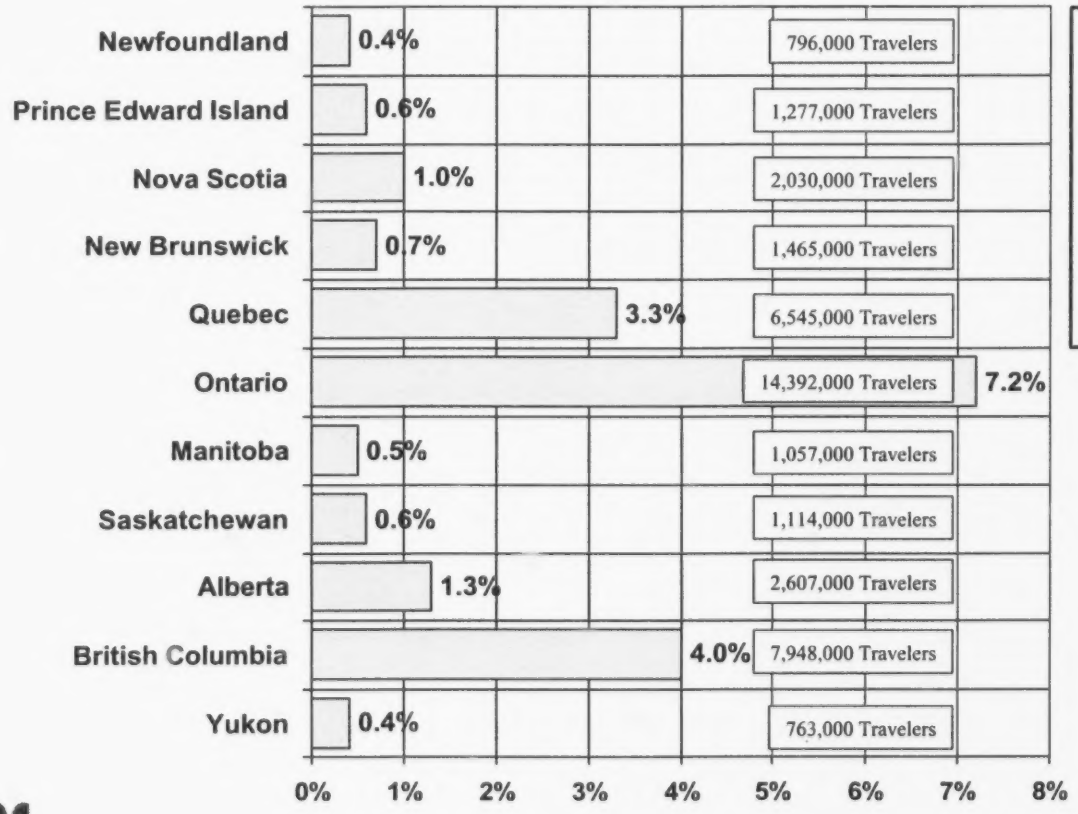
13.1 % of the U.S. residents had taken at least one trip to Canada during the past two years. 7.4 % have taken two or more trips while 1.9 % report having taken five or more trips to Canada in the last two years.



Percent of Total U.S. Population 18 Plus

Taking Pleasure Trips To Each Province

Trips to Canada During Past Two Years: By Province

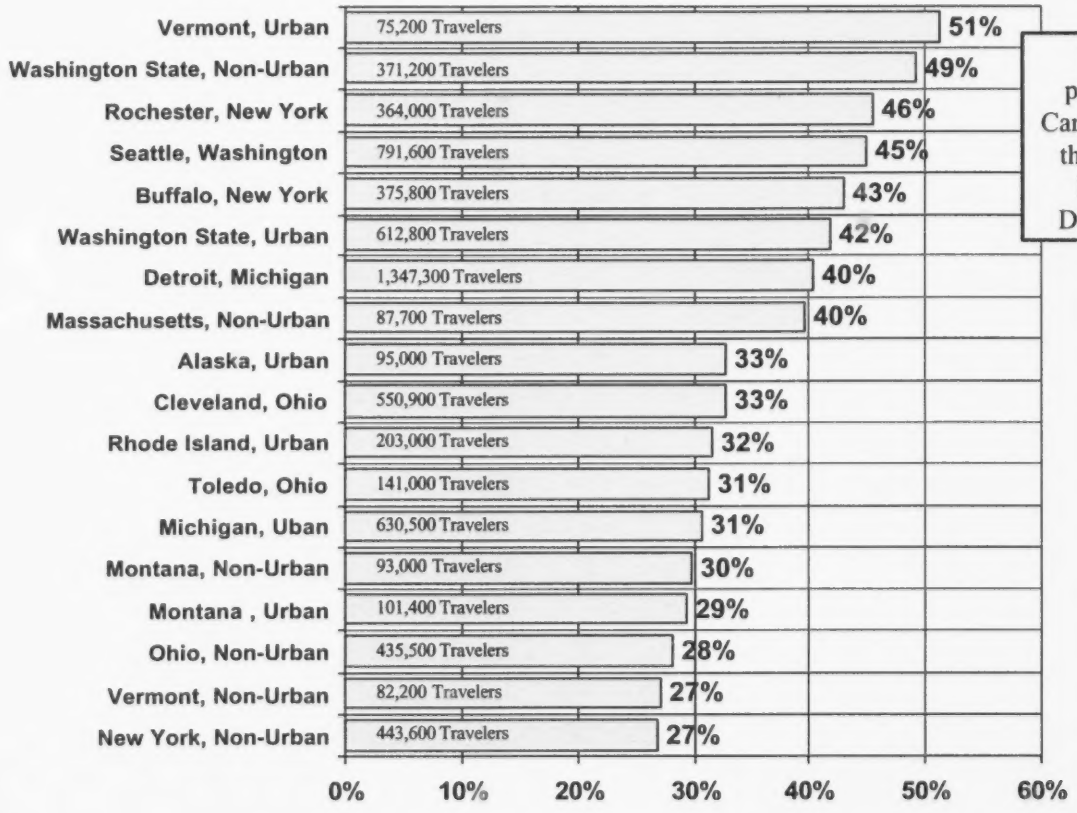


The province most frequently traveled to from the United States was Ontario. Quebec and British Columbia were also frequent destinations of U.S. travelers to Canada. The remaining seven provinces and the Yukon were traveled to by between 1.3 % and 0.4 % of the U.S. market during the past two years.

Percent of U.S. Population (18 Plus) Taking At Least One Trip to Canada

Canadian Pleasure Trips: Top U.S. Markets

Base: Top U.S. Markets: Trips to Canada During Past Two Years

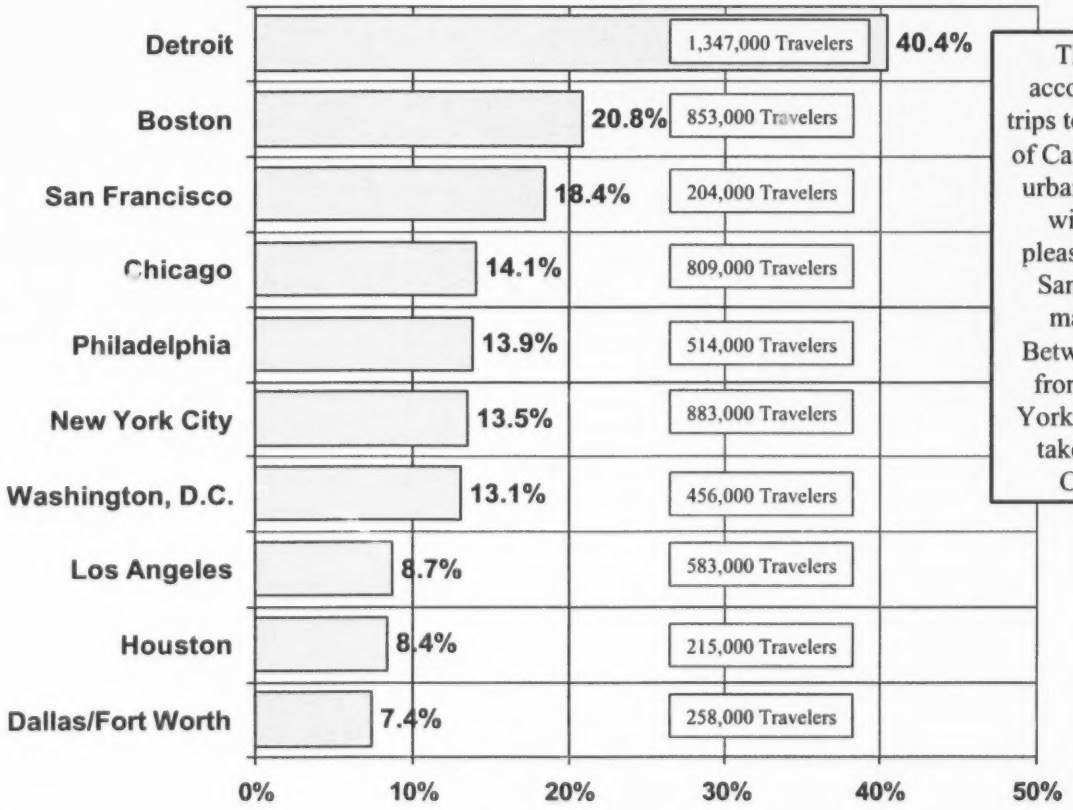


The top U.S. markets were primarily situated close to the Canadian border. Included among these are urban centres such as Rochester, Seattle, Buffalo, Detroit, Cleveland and Toledo.

Percent of U.S. Population (18 Plus) Taking At Least One Overnight Trip to Canada

Canadian Pleasure Trips: By U.S. Major Urban Centres

Base: Top Ten U.S. Markets: Trips to Canada During Past Two Years

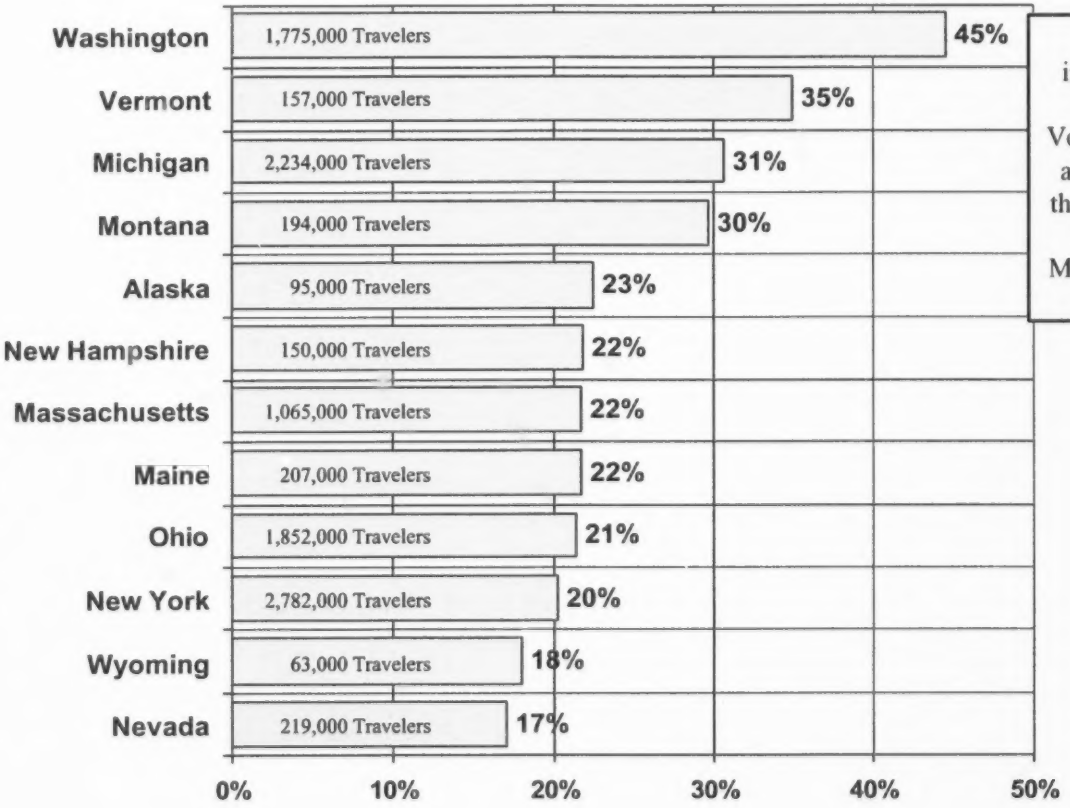


The top 10 U.S. urban centres account for 20.4 % of the pleasure trips to Canada. The highest incidence of Canadian travel among major U.S. urban centres is observed in Detroit with 40.4 % taking at least one pleasure trip to Canada. Boston and San Francisco form a second tier market of major urban centres. Between 13 % and 14 % of persons from Chicago, Philadelphia, New York City and Washington D.C. had taken at least one pleasure trip to Canada in the last two years.

Percent of U.S. Population (18 Plus) Taking At Least One Overnight Trip to Canada

Canadian Pleasure Trips: Top 12 U.S. States

Trips to Canada During Past Two Years

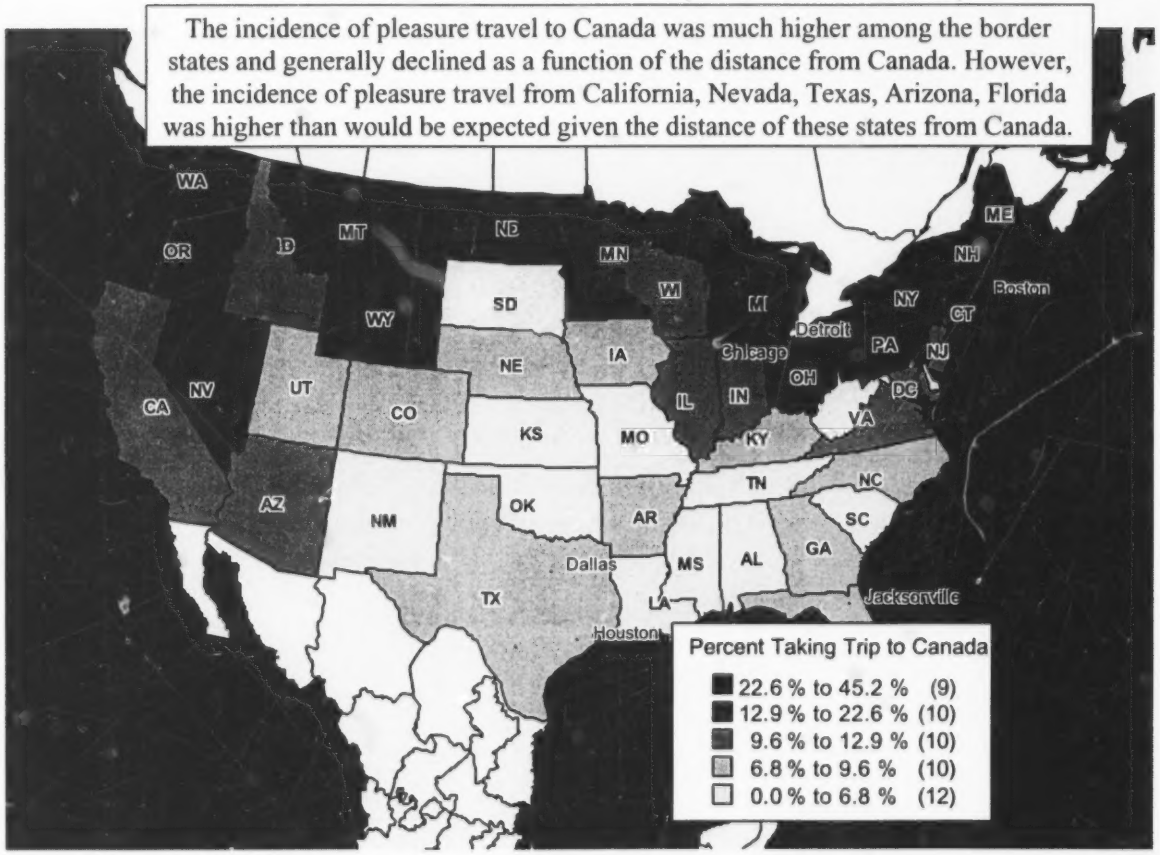


The states with the highest incidence of Canadian pleasure travel include Washington, Vermont, Michigan and Montana, all boarder states. Over 20 % of the population from Alaska, New Hampshire, Massachusetts, Maine, Ohio and New York. have also taken a trip to Canada.

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Canada

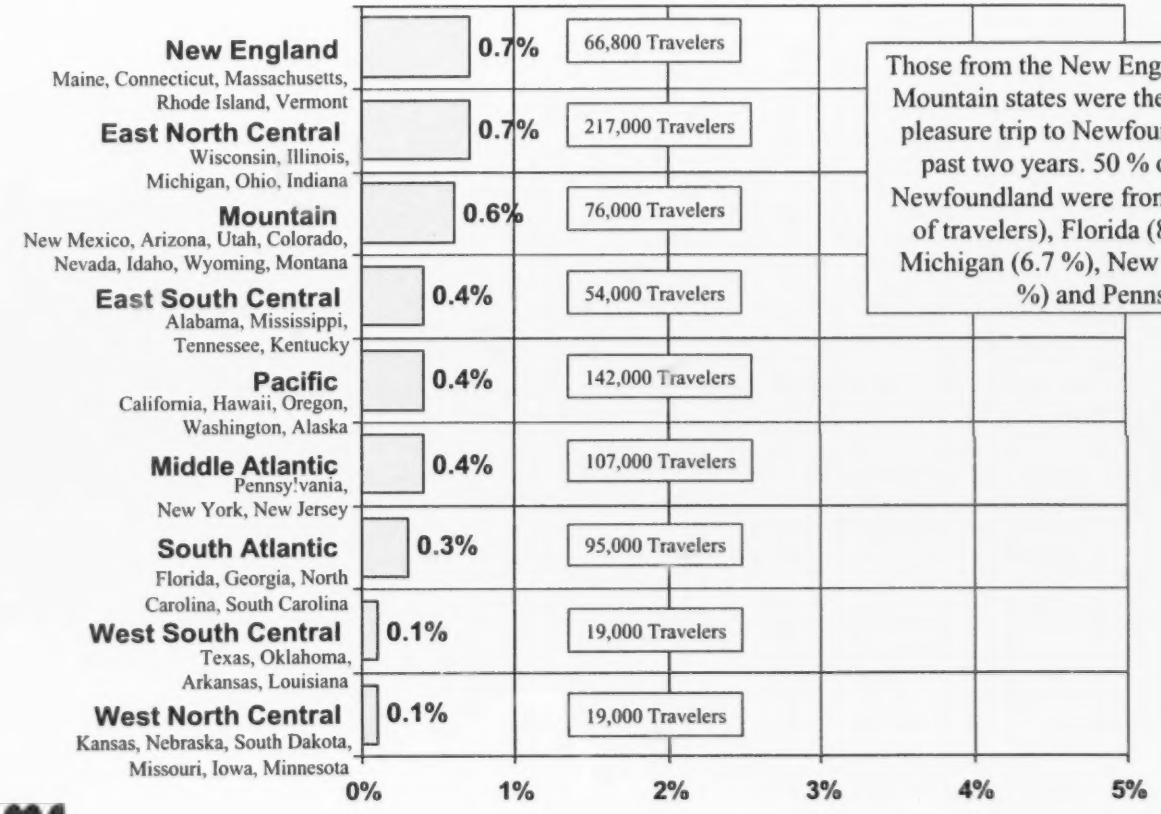
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Newfoundland/Labrador

Base: United States Residents (18 Years or Older)

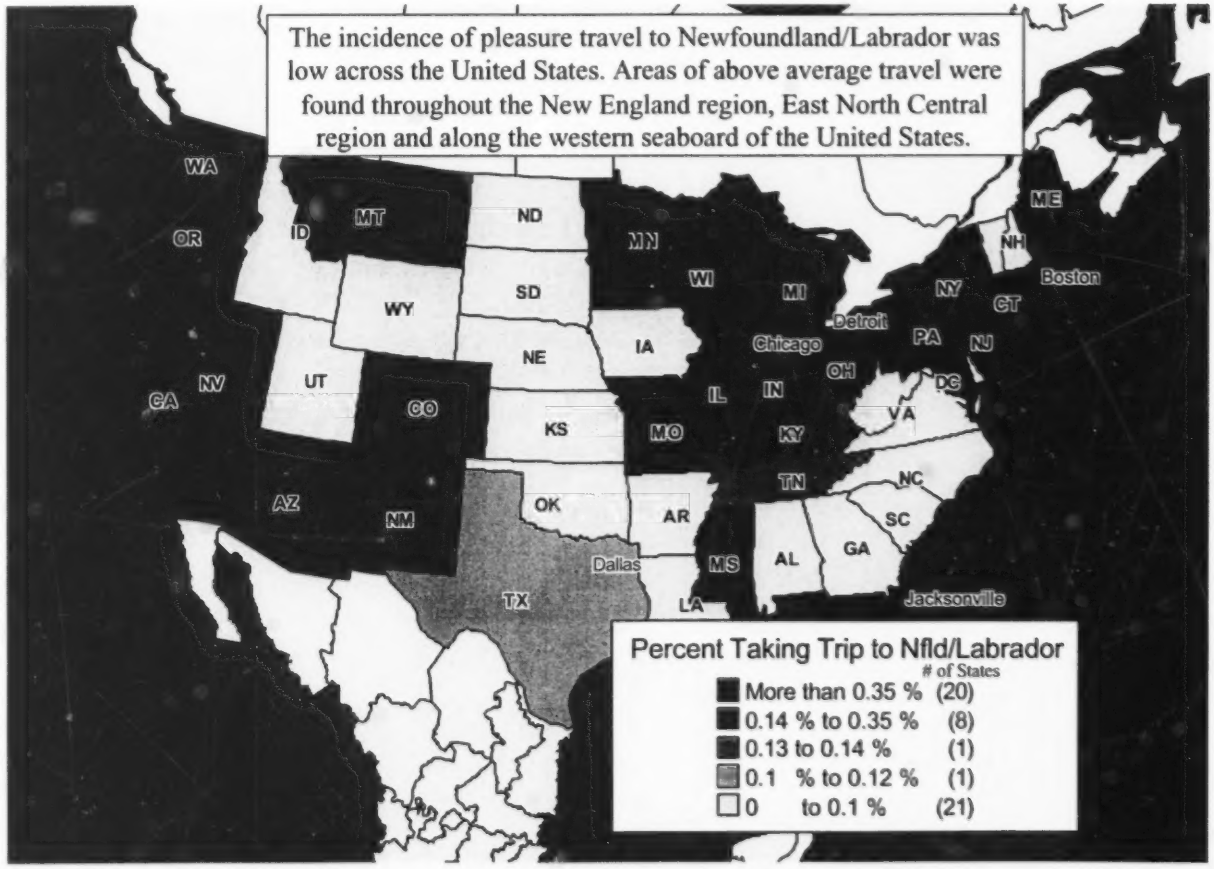


Those from the New England, East North Central and Mountain states were the most likely to have taken a pleasure trip to Newfoundland/Labrador during the past two years. 50 % of all pleasure travelers to Newfoundland were from seven states: Ohio (10.6 % of travelers), Florida (8.5 %), California (7.0 %), Michigan (6.7 %), New Jersey (5.8 %), Illinois (5.8 %) and Pennsylvania (5.6 %).

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Newfoundland/Labrador

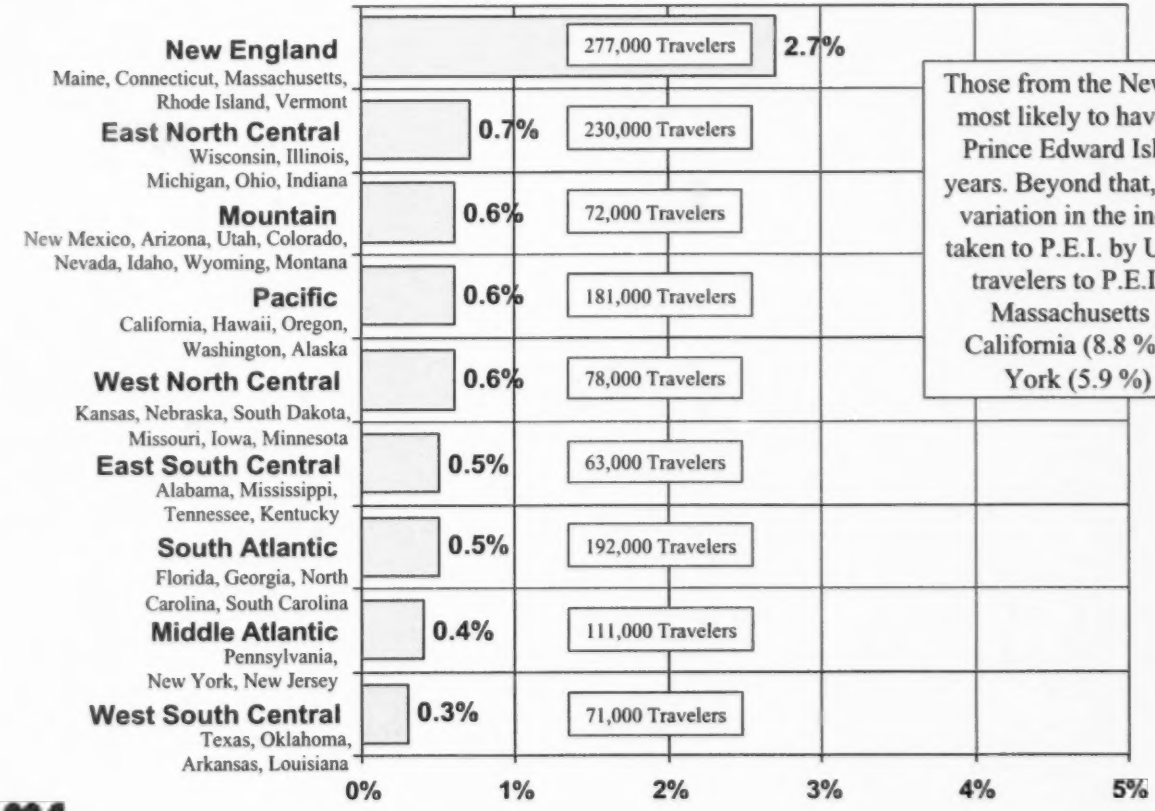
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Prince Edward Island

Base: United States Residents (18 Years or Older)

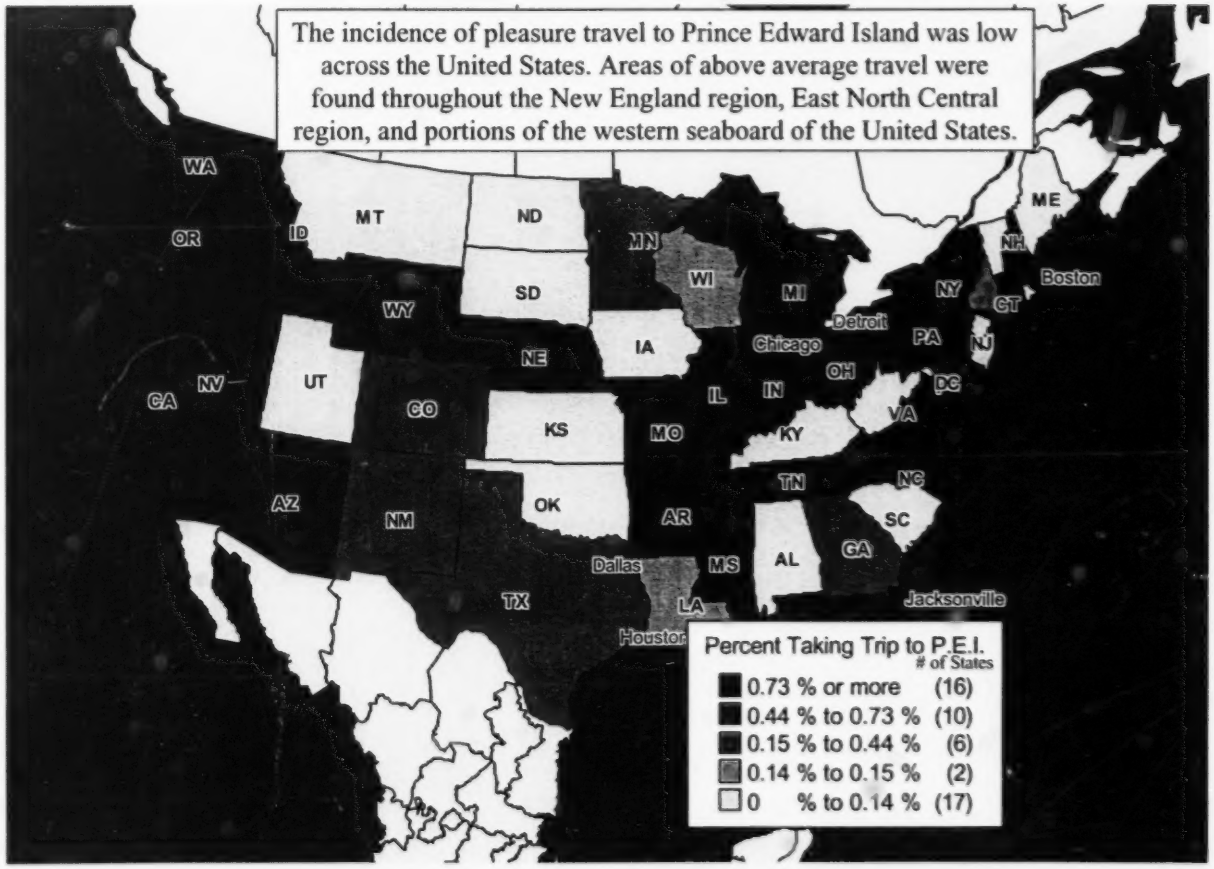


Those from the New England states were the most likely to have taken a pleasure trip to Prince Edward Island during the past two years. Beyond that, there was relatively little variation in the incidence of pleasure trips taken to P.E.I. by U.S. region. 44.4 % of the travelers to P.E.I. were from five states: Massachusetts (18.0 % of travelers), California (8.8 %), Indiana (6.5 %), New York (5.9 %) and Illinois (5.2 %).

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Prince Edward Island

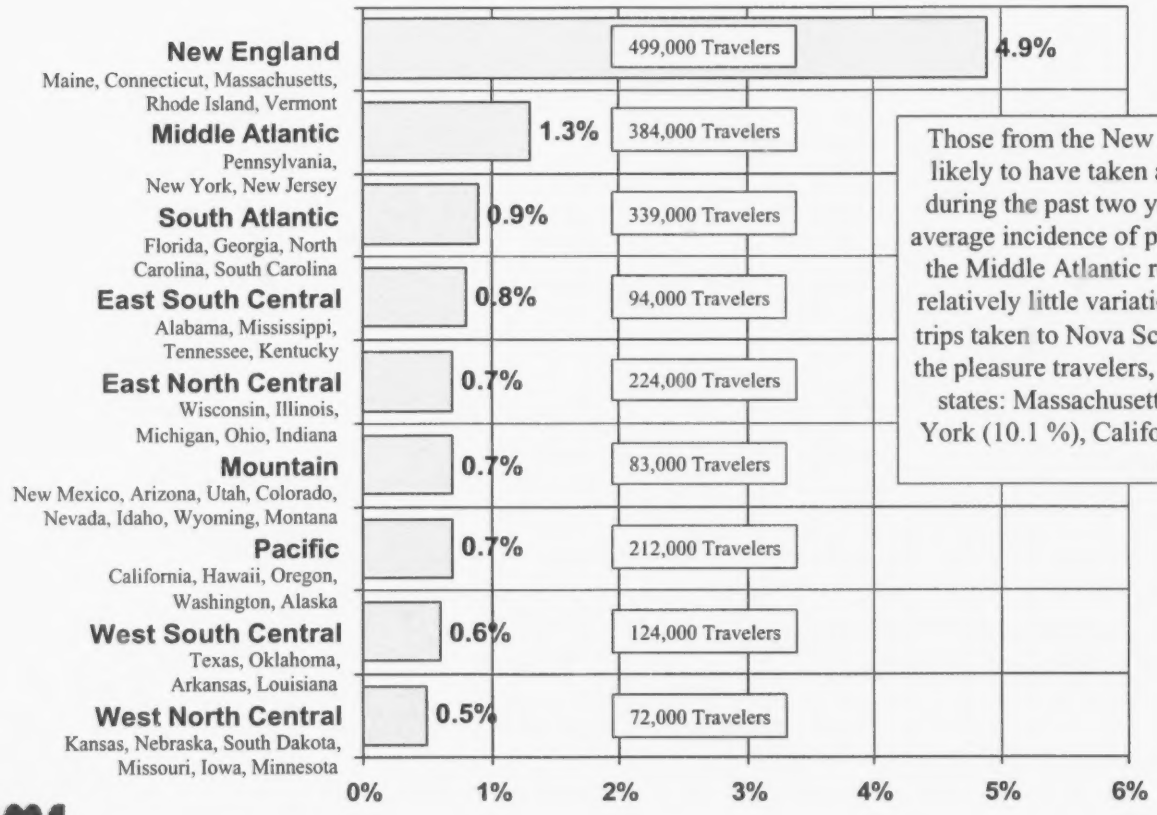
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Nova Scotia

Base: United States Residents (18 Years or Older)

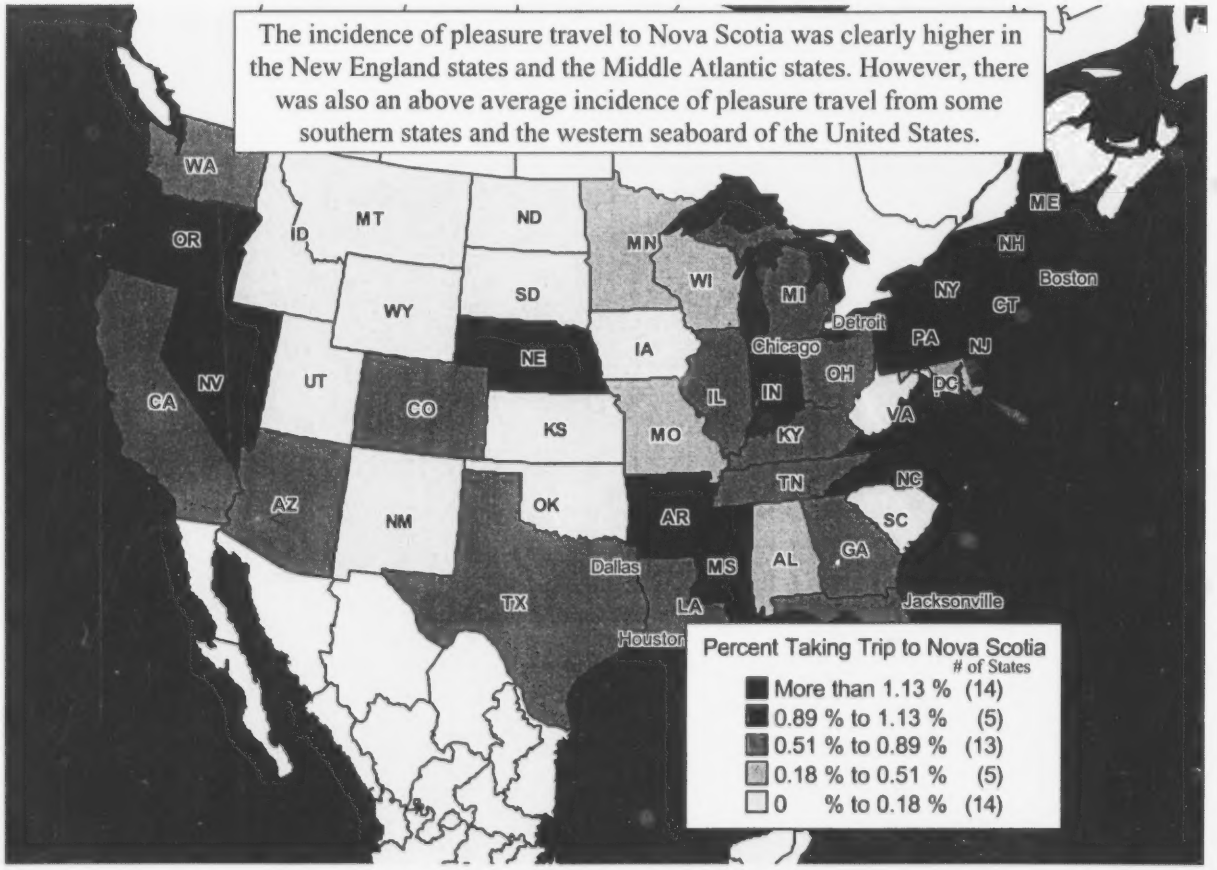


Those from the New England states were the most likely to have taken a pleasure trip to Nova Scotia during the past two years. There was also an above average incidence of pleasure trips among those from the Middle Atlantic region. Beyond that, there was relatively little variation in the incidence of pleasure trips taken to Nova Scotia by U.S. region. 41.9 % of the pleasure travelers, to Nova Scotia were from four states: Massachusetts (15.1 % of travelers), New York (10.1 %), California (6.5 %) and Pennsylvania (5.3 %).

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Nova Scotia

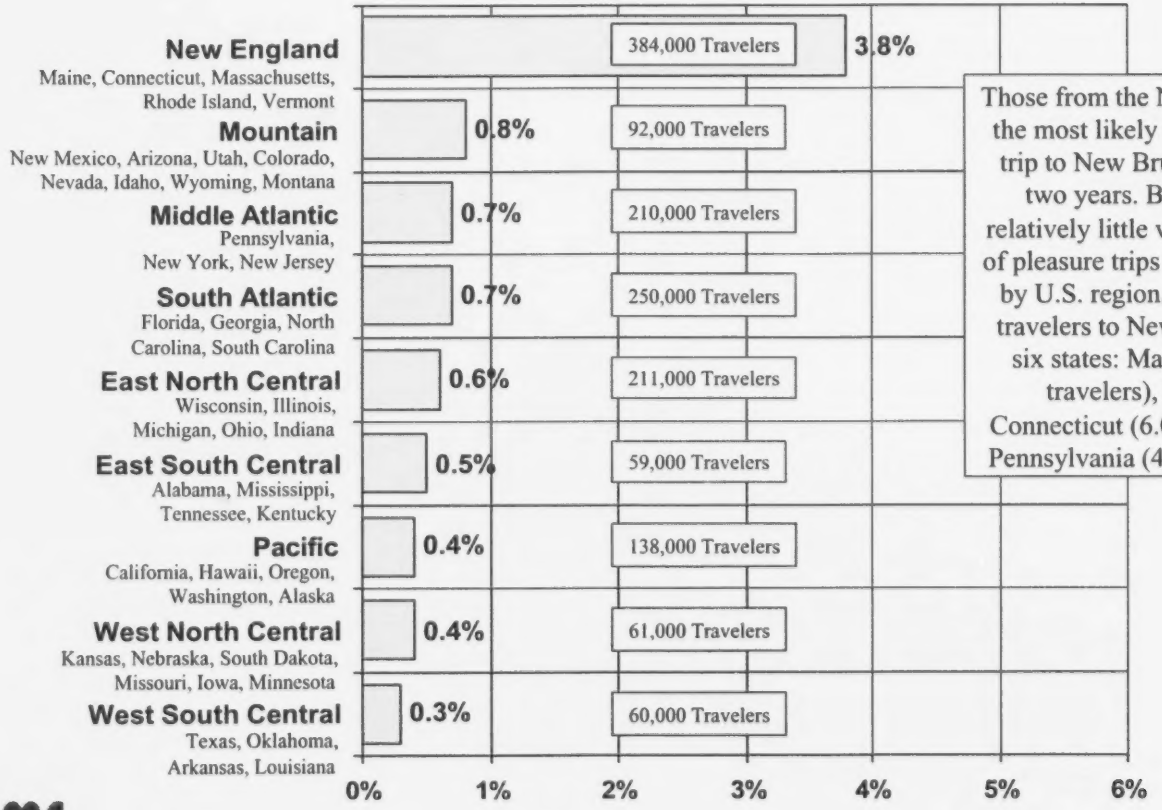
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to New Brunswick

Base: United States Residents (18 Years or Older)

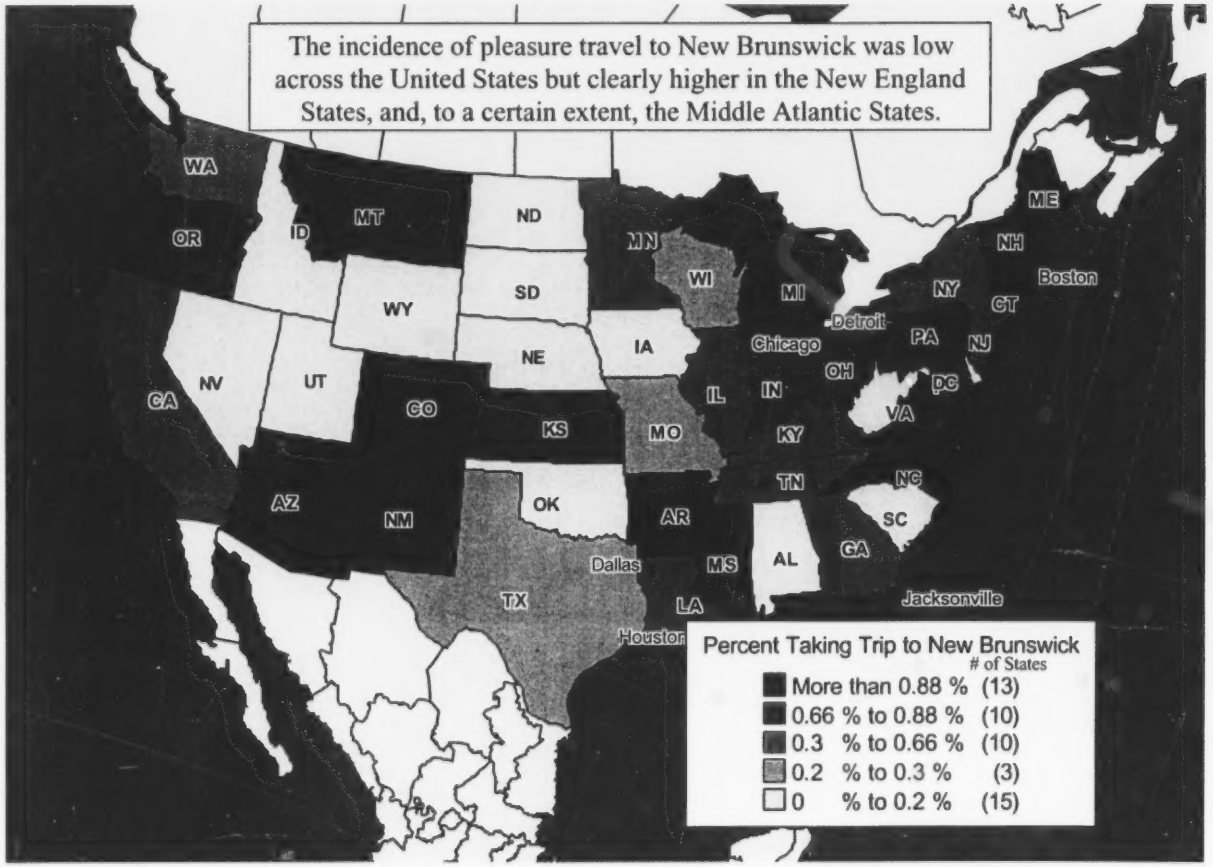


Those from the New England States were the most likely to have taken a pleasure trip to New Brunswick during the past two years. Beyond that, there was relatively little variation in the incidence of pleasure trips taken to New Brunswick by U.S. region. 41.9 % of the pleasure travelers to New Brunswick were from six states: Massachusetts (14.1 % of travelers), New York (6.9 %), Connecticut (6.0 %), California (5.3 %), Pennsylvania (4.9 %) & Florida (4.7 %).

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to New Brunswick

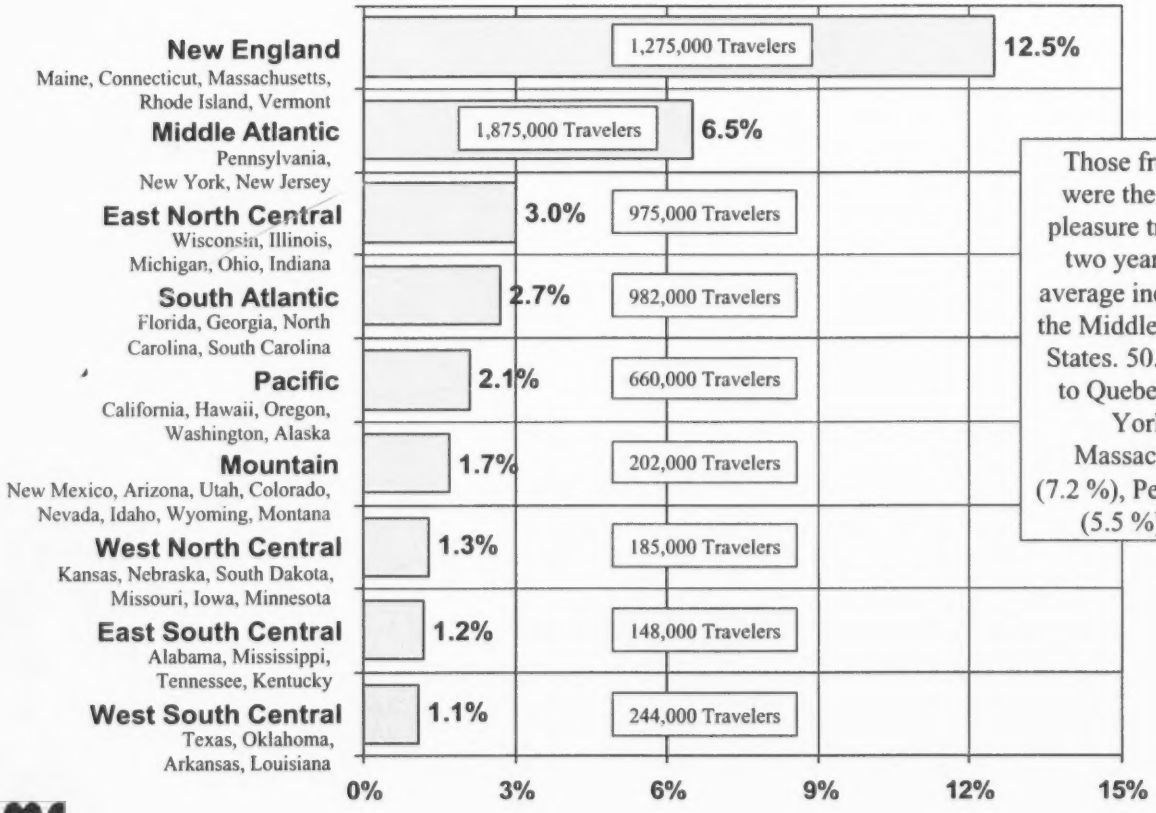
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Quebec

Base: United States Residents (18 Years or Older)

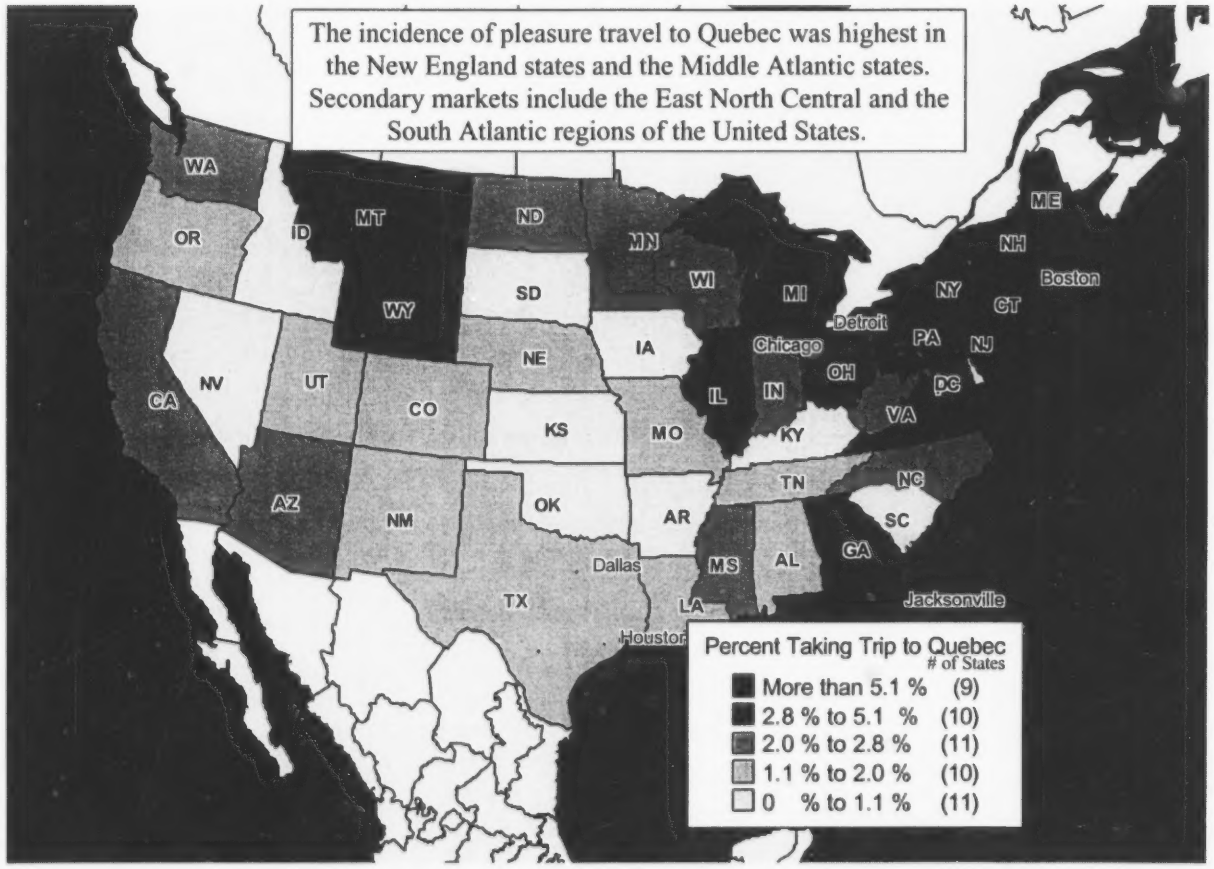


Those from the New England states were the most likely to have taken a pleasure trip to Quebec during the past two years. There was also an above average incidence of pleasure trips from the Middle Atlantic region of the United States. 50.2 % of the pleasure travelers to Quebec were from six states: New York (16.5 % of travelers), Massachusetts (8.8 %), California (7.2 %), Pennsylvania (6.9 %), Michigan (5.5 %) and New Jersey (5.3 %).

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Quebec

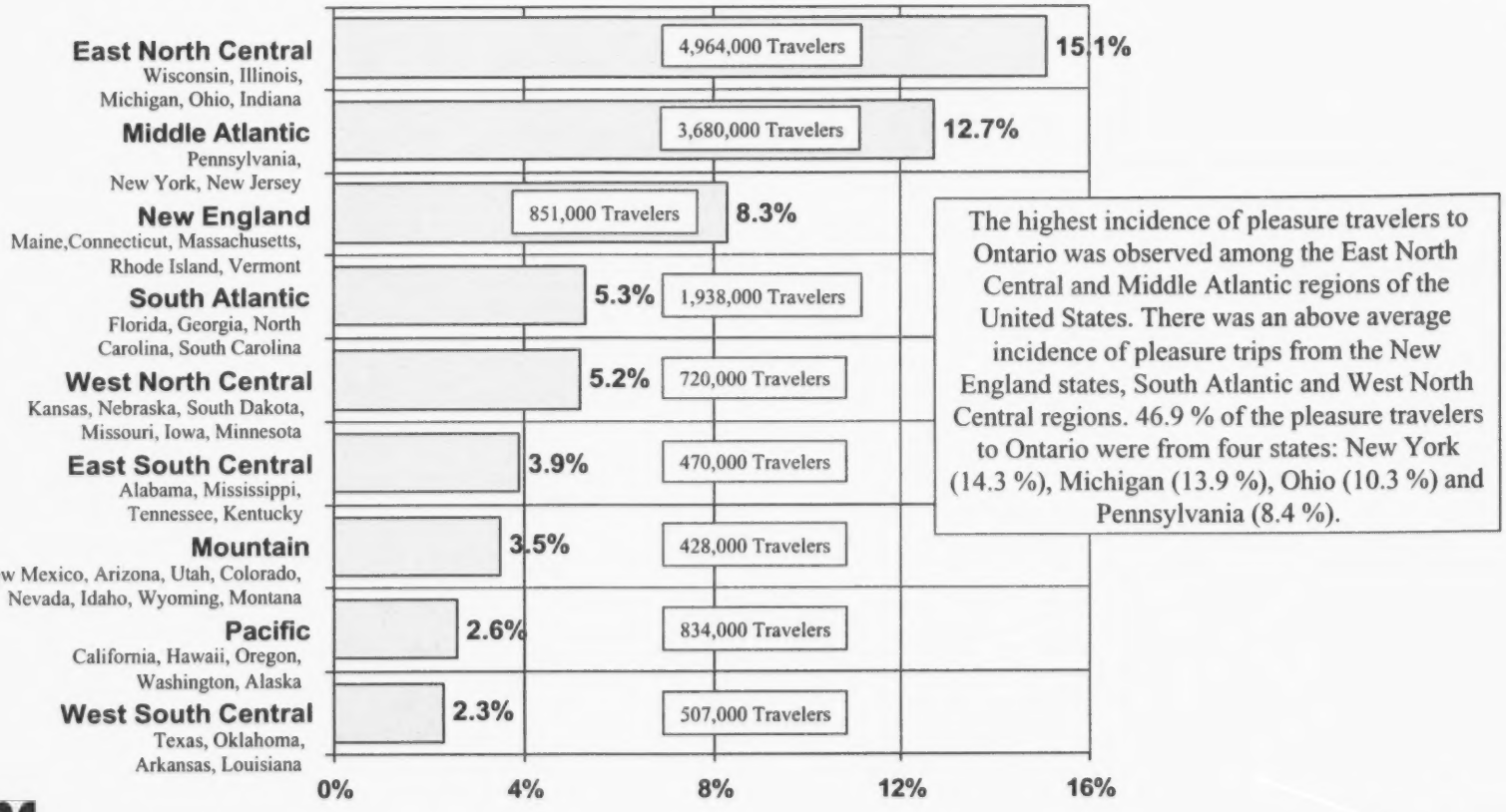
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Ontario

Base: United States Residents (18 Years or Older)

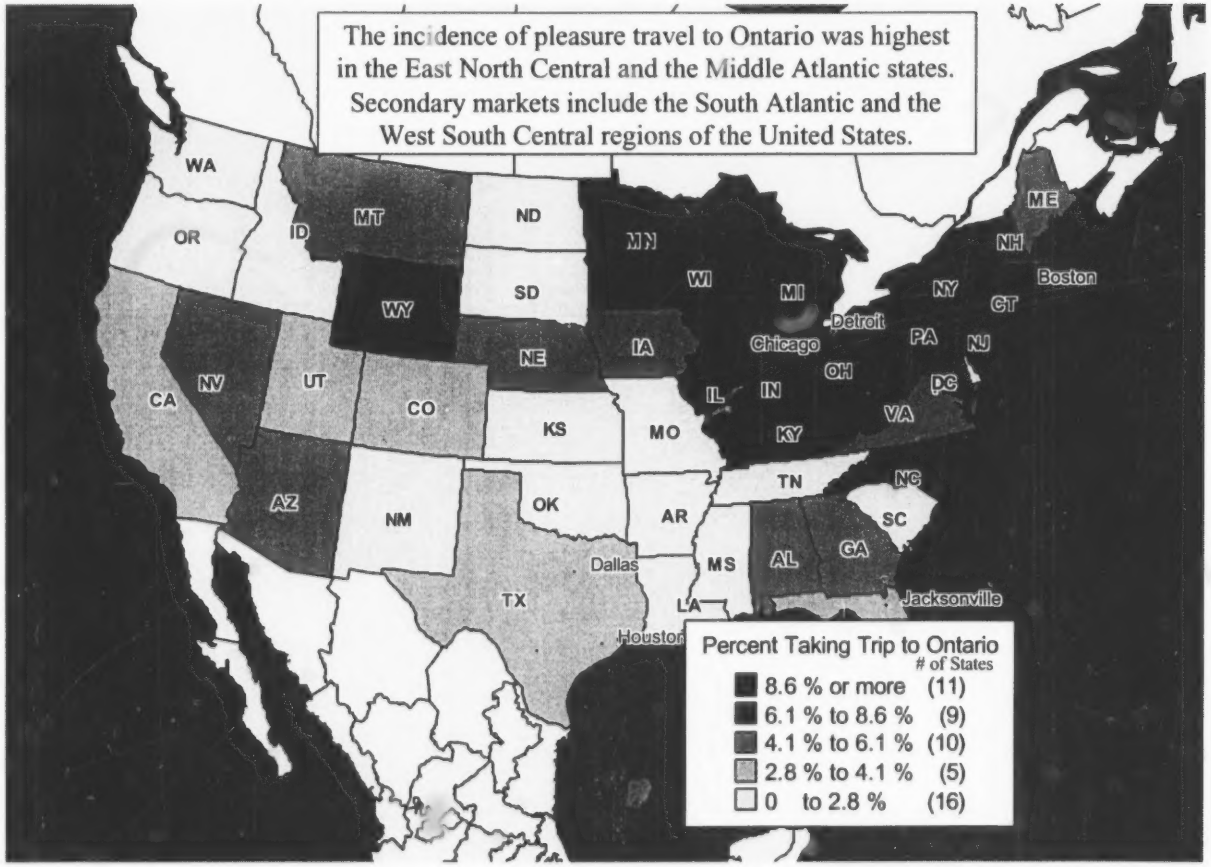


The highest incidence of pleasure travelers to Ontario was observed among the East North Central and Middle Atlantic regions of the United States. There was an above average incidence of pleasure trips from the New England states, South Atlantic and West North Central regions. 46.9 % of the pleasure travelers to Ontario were from four states: New York (14.3 %), Michigan (13.9 %), Ohio (10.3 %) and Pennsylvania (8.4 %).

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Ontario

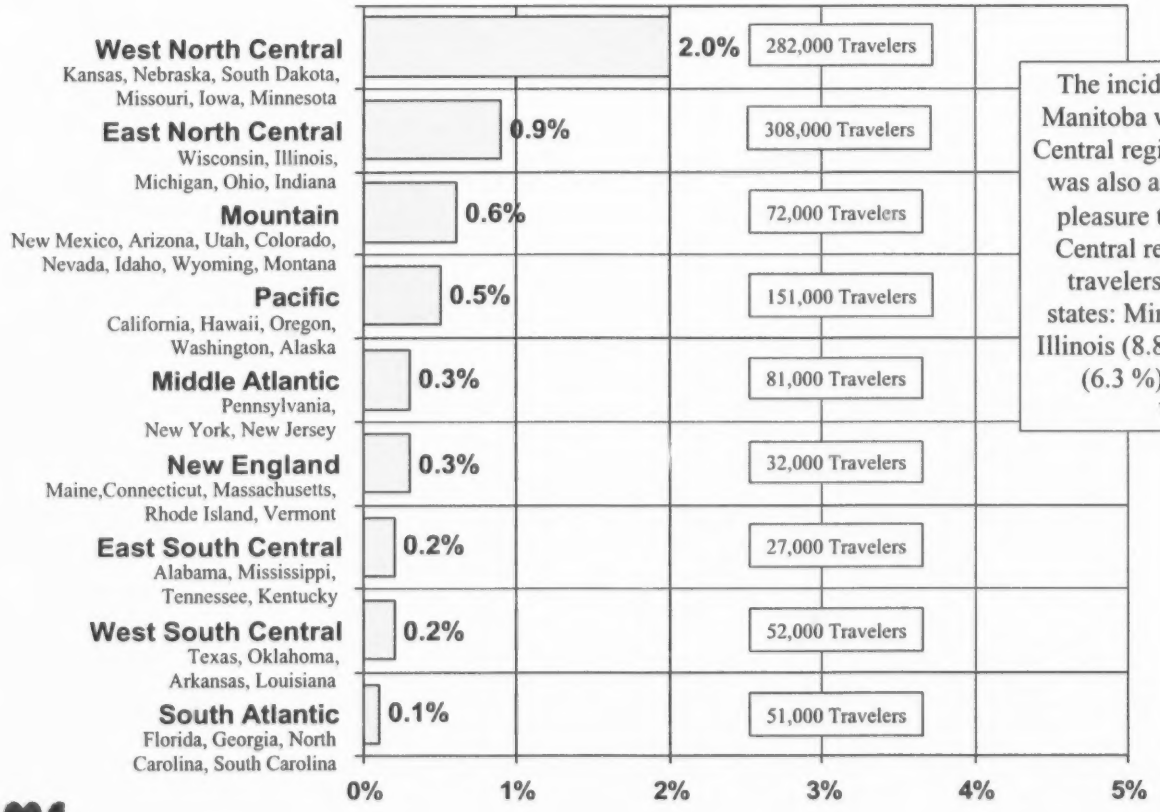
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Manitoba

Base: United States Residents (18 Years or Older)

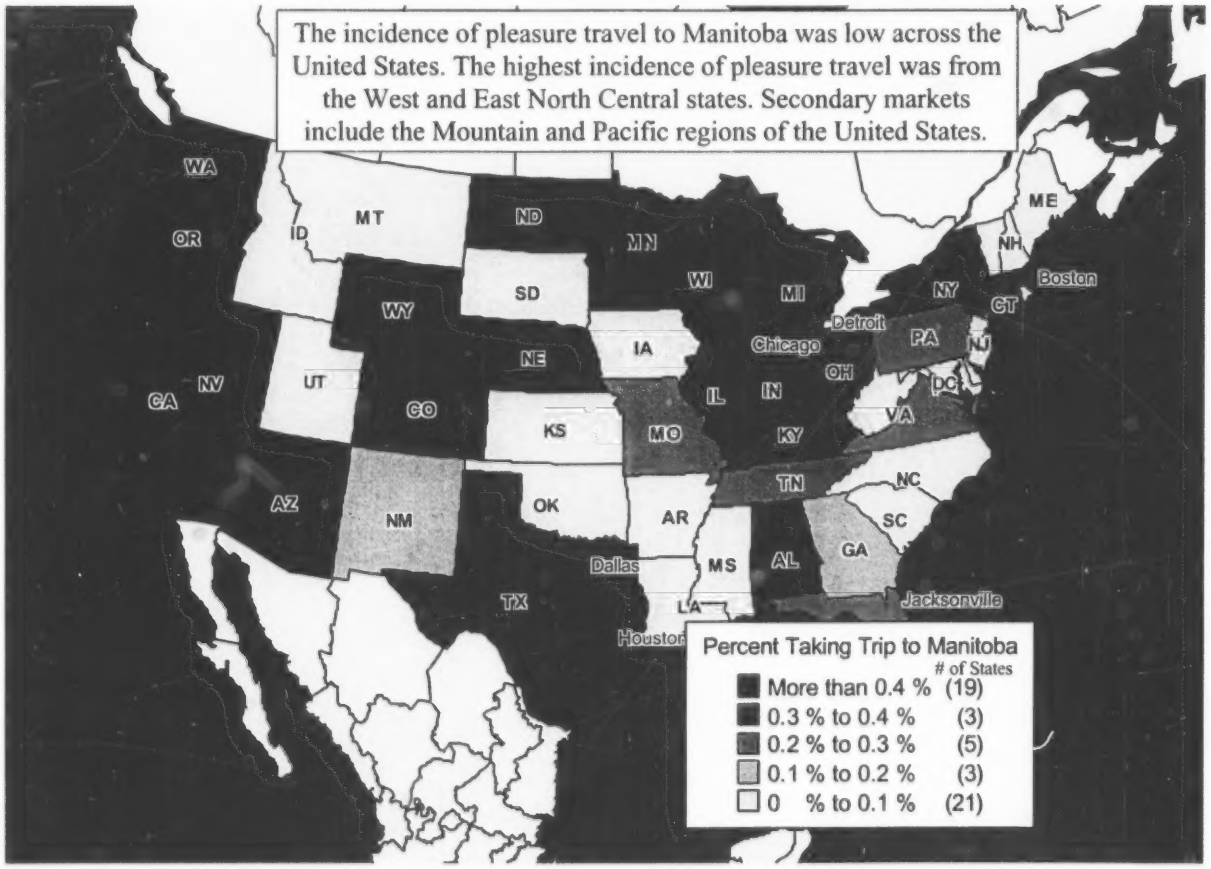


The incidence of pleasure travelers to Manitoba was highest in the West North Central region of the United States. There was also an above average incidence of pleasure trips from the the East North Central region. 53.3 % of the pleasure travelers to Manitoba were from six states: Minnesota (18.6 % of travelers), Illinois (8.8 %), Ohio (7.3 %), New York (6.3 %), Washington (6.3 %) and Wisconsin (5.9 %).

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Manitoba

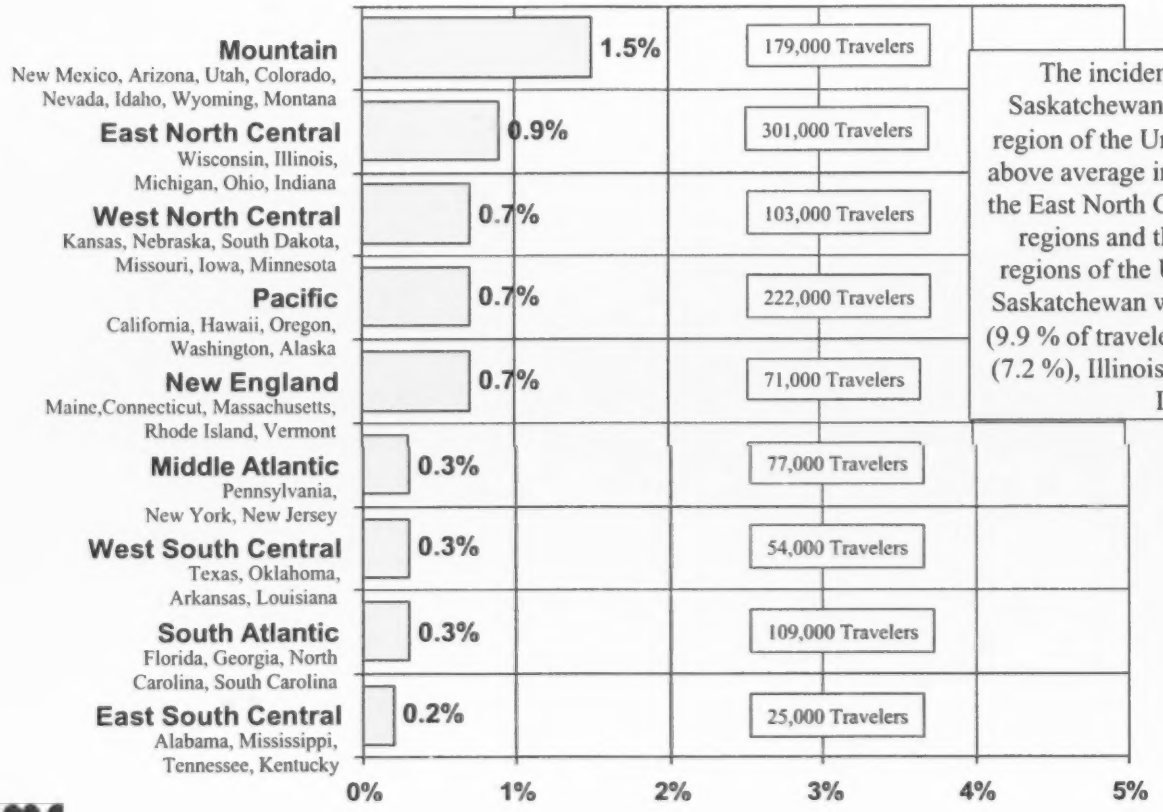
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Saskatchewan

Base: United States Residents (18 Years or Older)

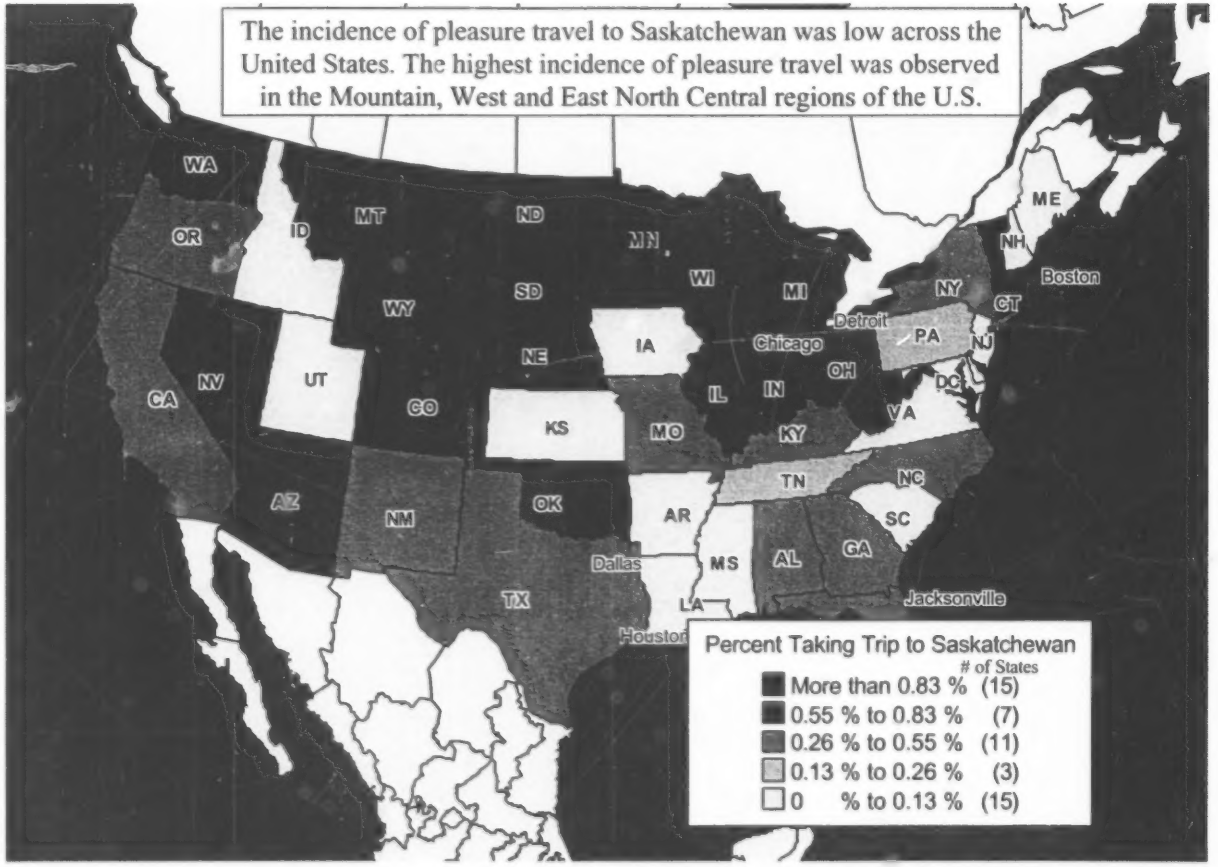


The incidence of pleasure travelers to Saskatchewan was highest in the Mountain region of the United States. There was also an above average incidence of pleasure trips from the East North Central and West North Central regions and the Pacific and New England regions of the U.S. 44.1 % of the travelers to Saskatchewan were from six states: California (9.9 % of travelers), Ohio (7.3 %), Washington (7.2 %), Illinois (6.8 %) Colorado (6.7 %) and Indiana (6.3 %).

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Saskatchewan

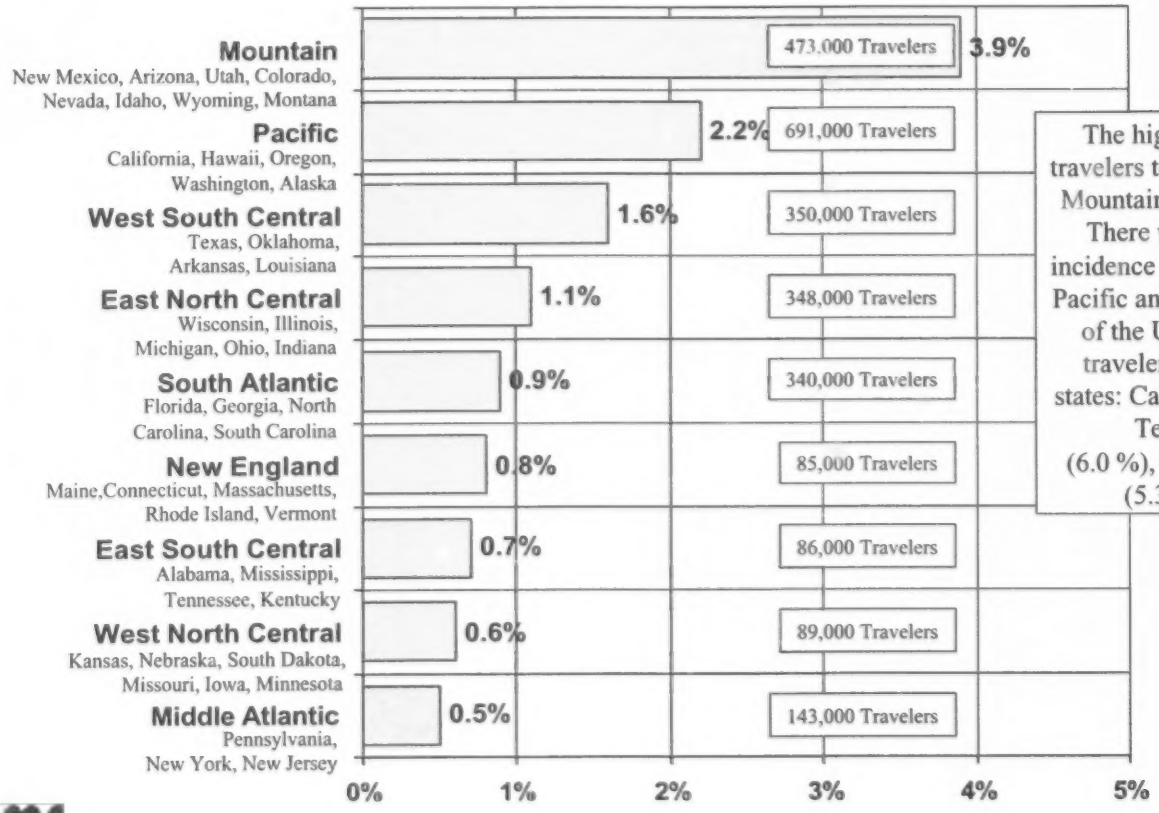
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Alberta

Base: United States Residents (18 Years or Older)

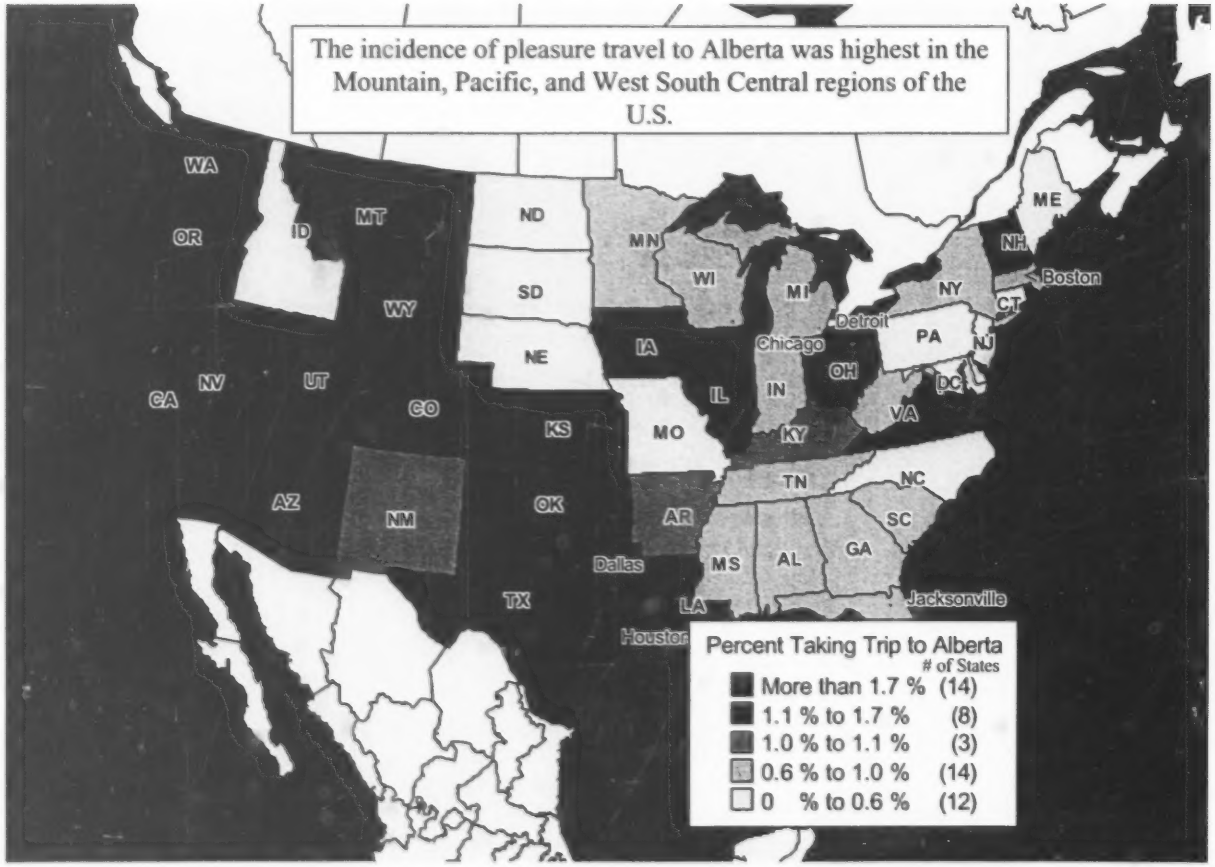


The highest incidence of pleasure travelers to Alberta was observed in the Mountain region of the United States. There was also an above average incidence of pleasure travelers from the Pacific and West South Central regions of the U.S. 44.0 % of the pleasure travelers to Alberta were from six states: California (12.9 % of travelers), Texas (8.9 %), Montana (6.0 %), Washington (5.9 %) Florida (5.3 %) and Ohio (5.1 %).

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Alberta

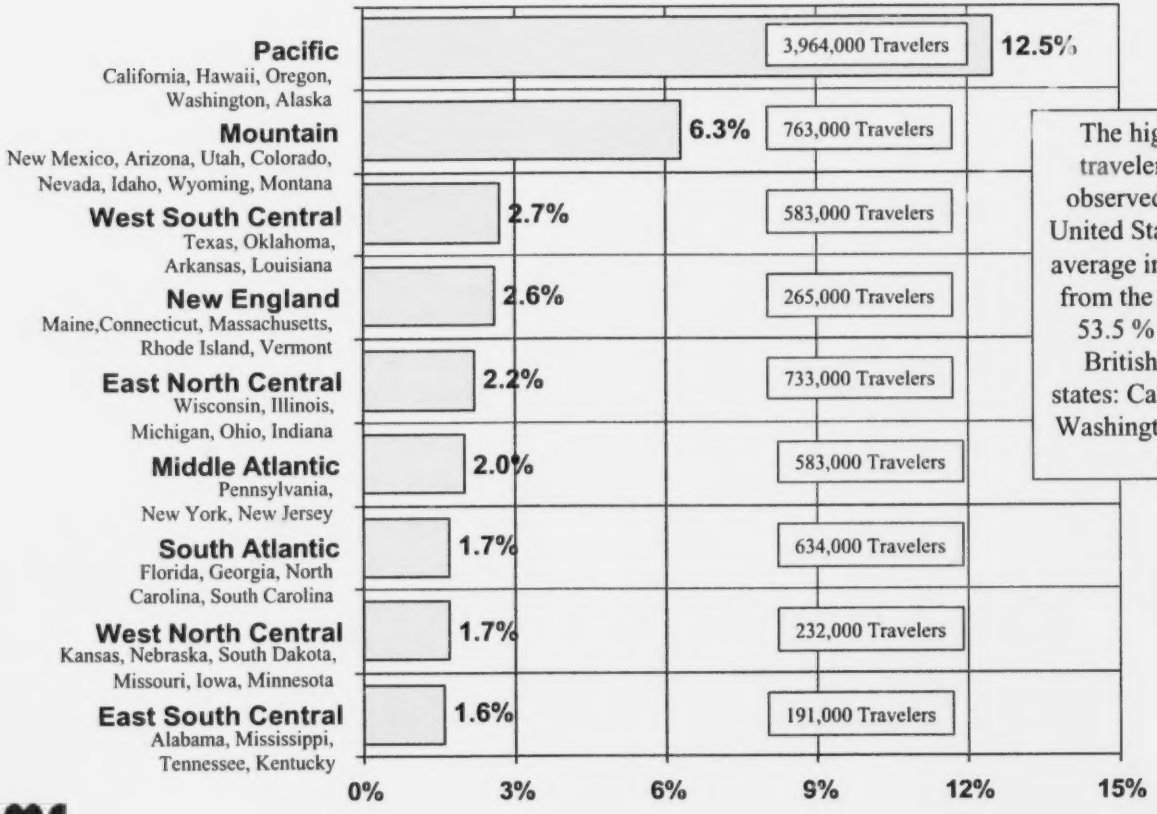
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to British Columbia

Base: United States Residents (18 Years or Older)

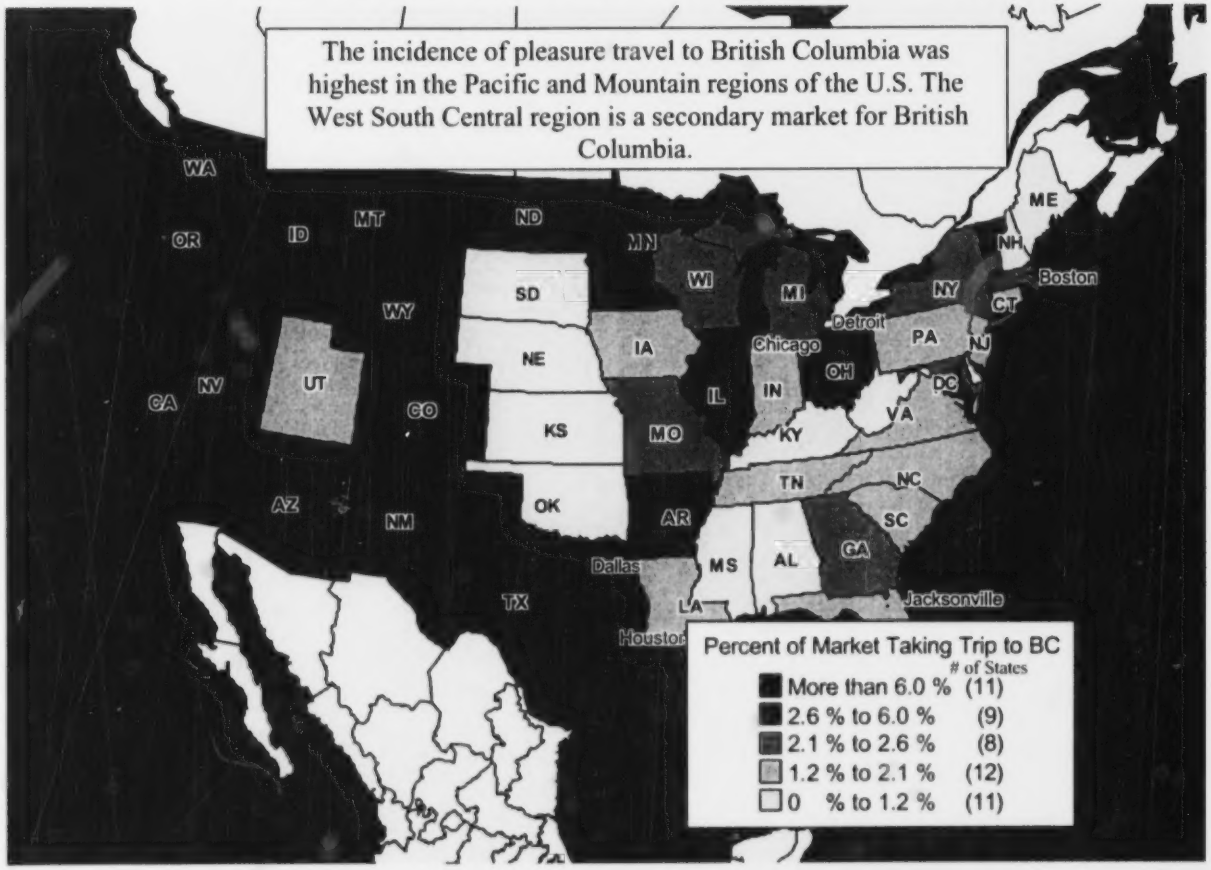


The highest incidence of pleasure travelers to British Columbia was observed in the Pacific region of the United States. There was also an above average incidence of pleasure travelers from the Mountain region of the U.S. 53.5 % of the pleasure travelers to British Columbia were from four states: California (21.4 % of travelers), Washington (21.0 %), Oregon (5.7 %) and Texas (5.4 %).

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to British Columbia

Base: United States Residents (18 Years or Older)



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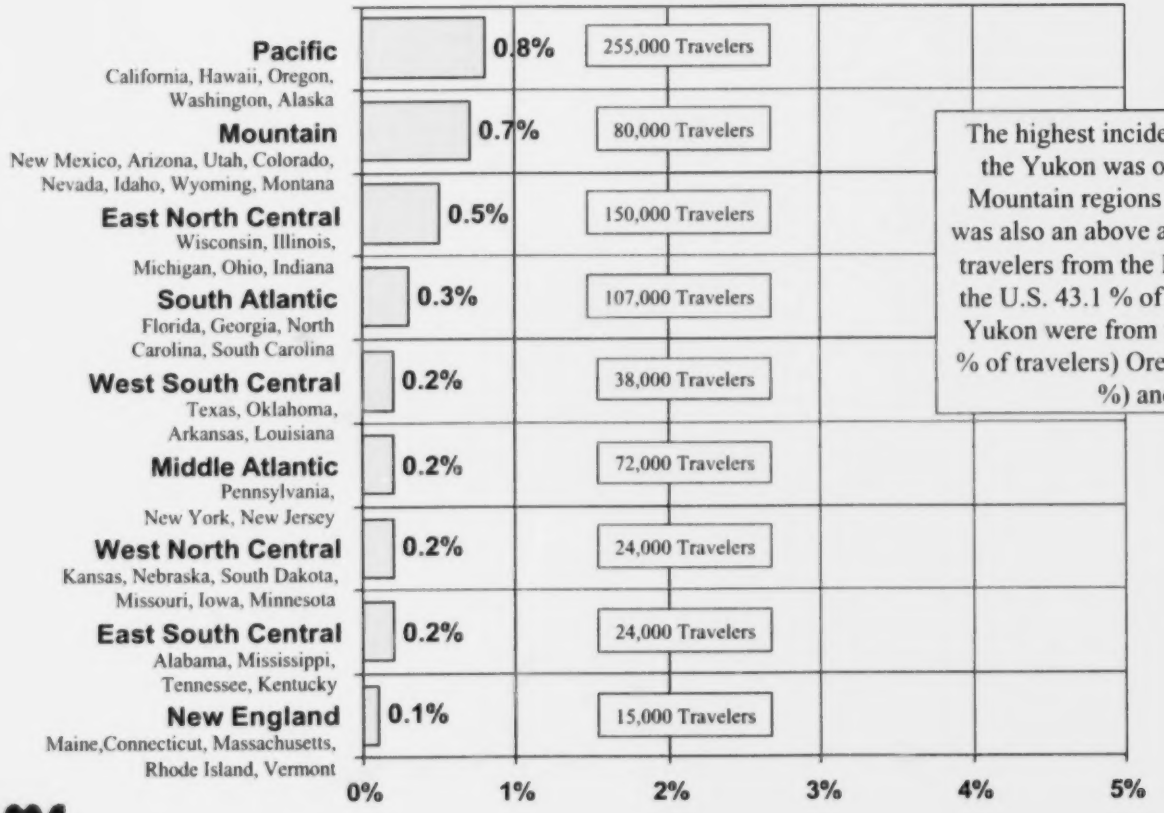
Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Yukon

Base: United States Residents (18 Years or Older)

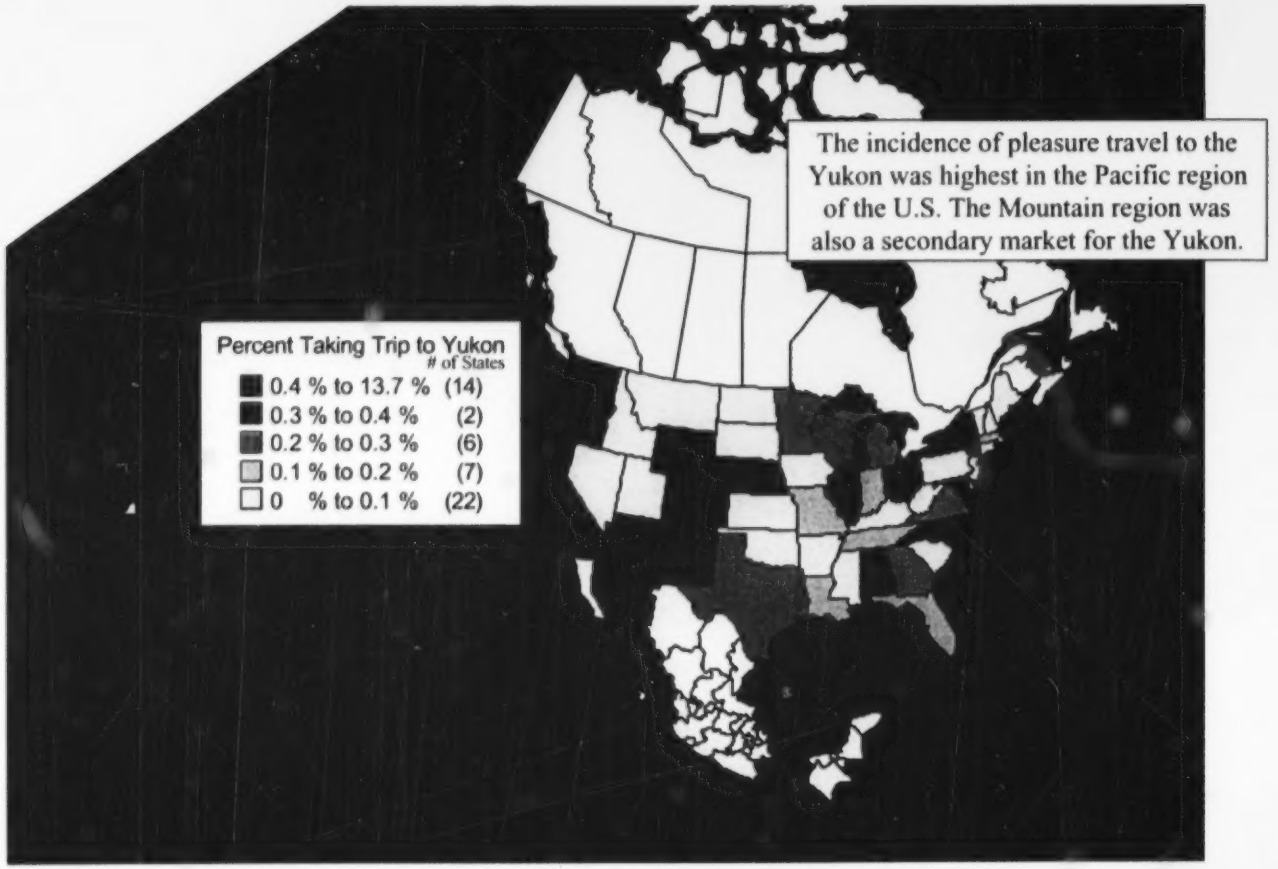


The highest incidence of pleasure travelers to the Yukon was observed in the Pacific and Mountain regions of the United States. There was also an above average incidence of pleasure travelers from the East North Central region of the U.S. 43.1 % of the pleasure travelers to the Yukon were from four states: California (16.8 % of travelers) Oregon (9.4 %), New York (9.3 %) and Ohio (7.5 %).

Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

Pleasure Trips to Yukon

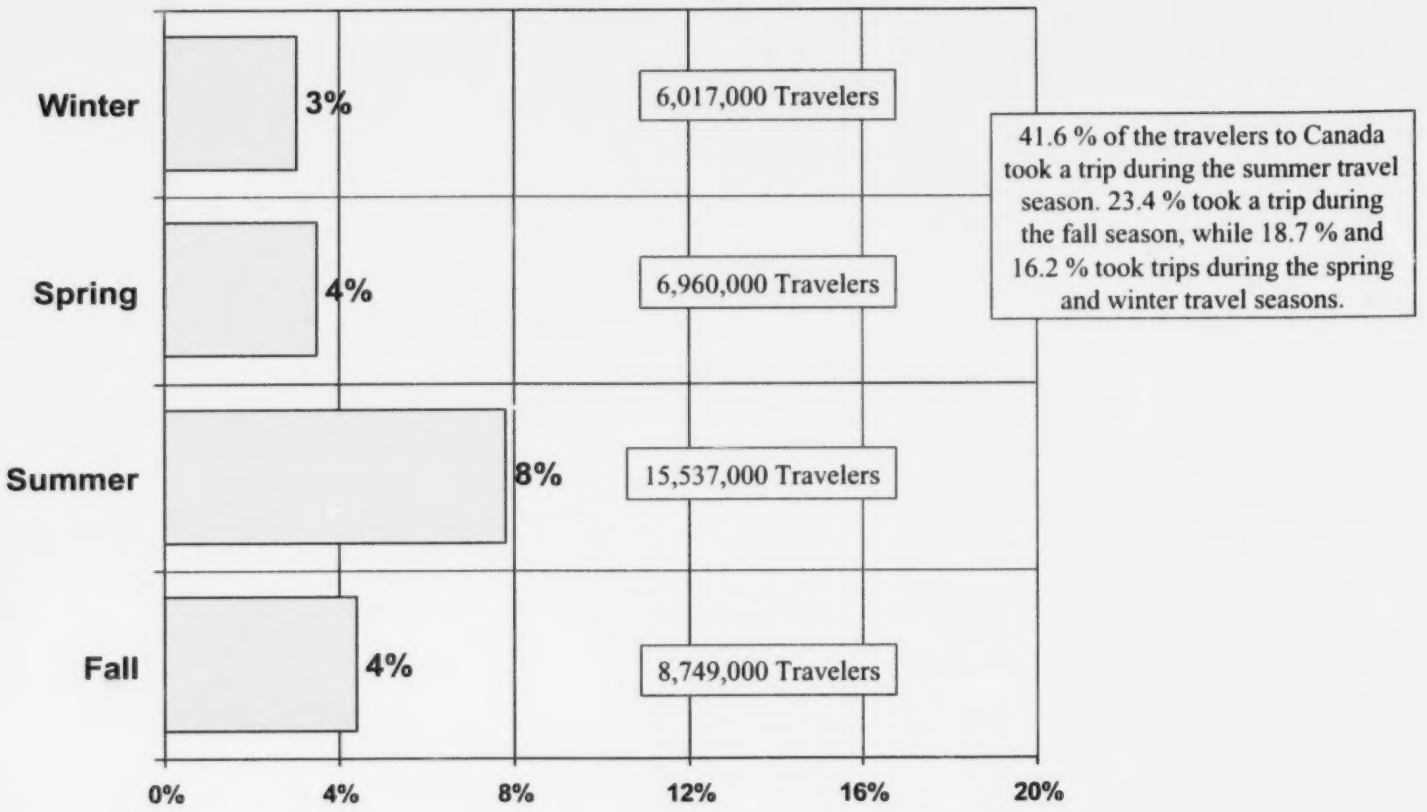
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

By Travel Season

Base: United States Residents (18 Years or Older)



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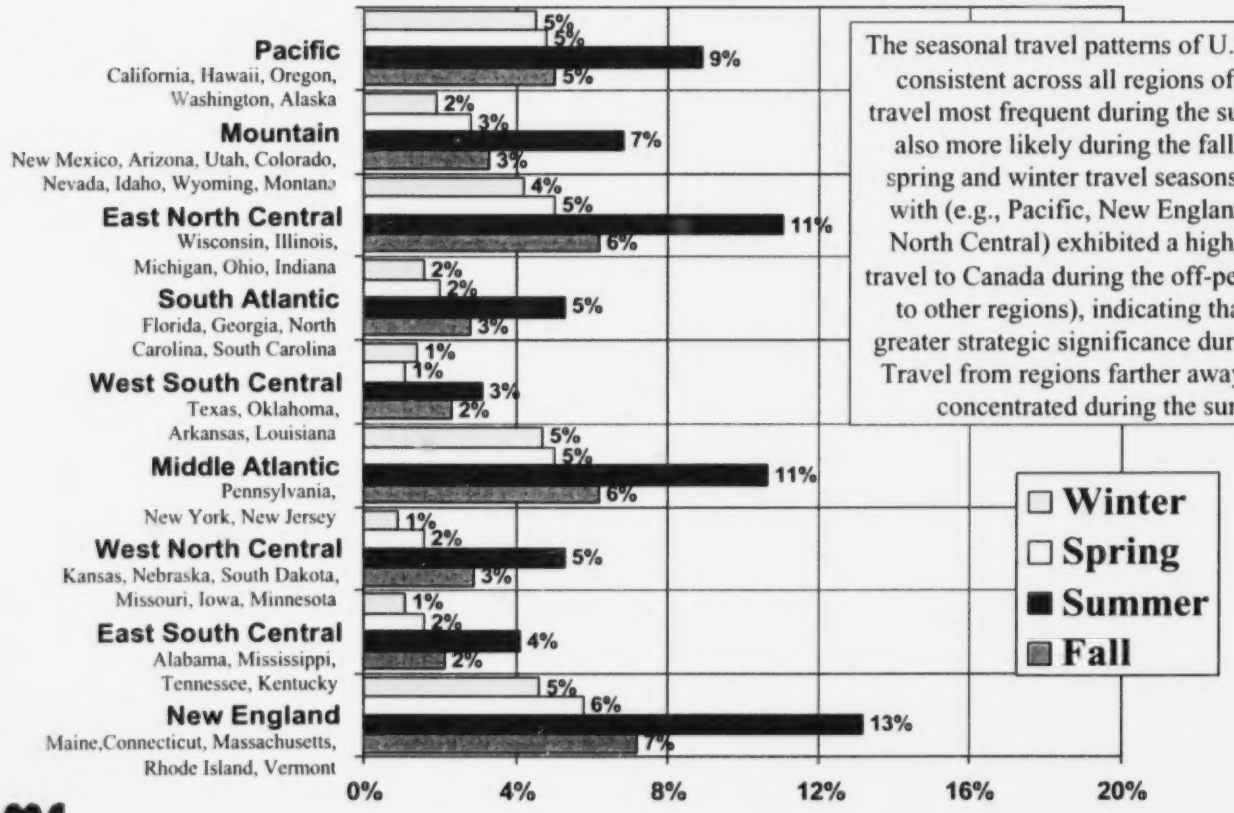
Percent of U.S. Population Taking At Least One Pleasure Trip in Last two years

By Travel Season and Region

Base: United States Residents (18 Years or Older)

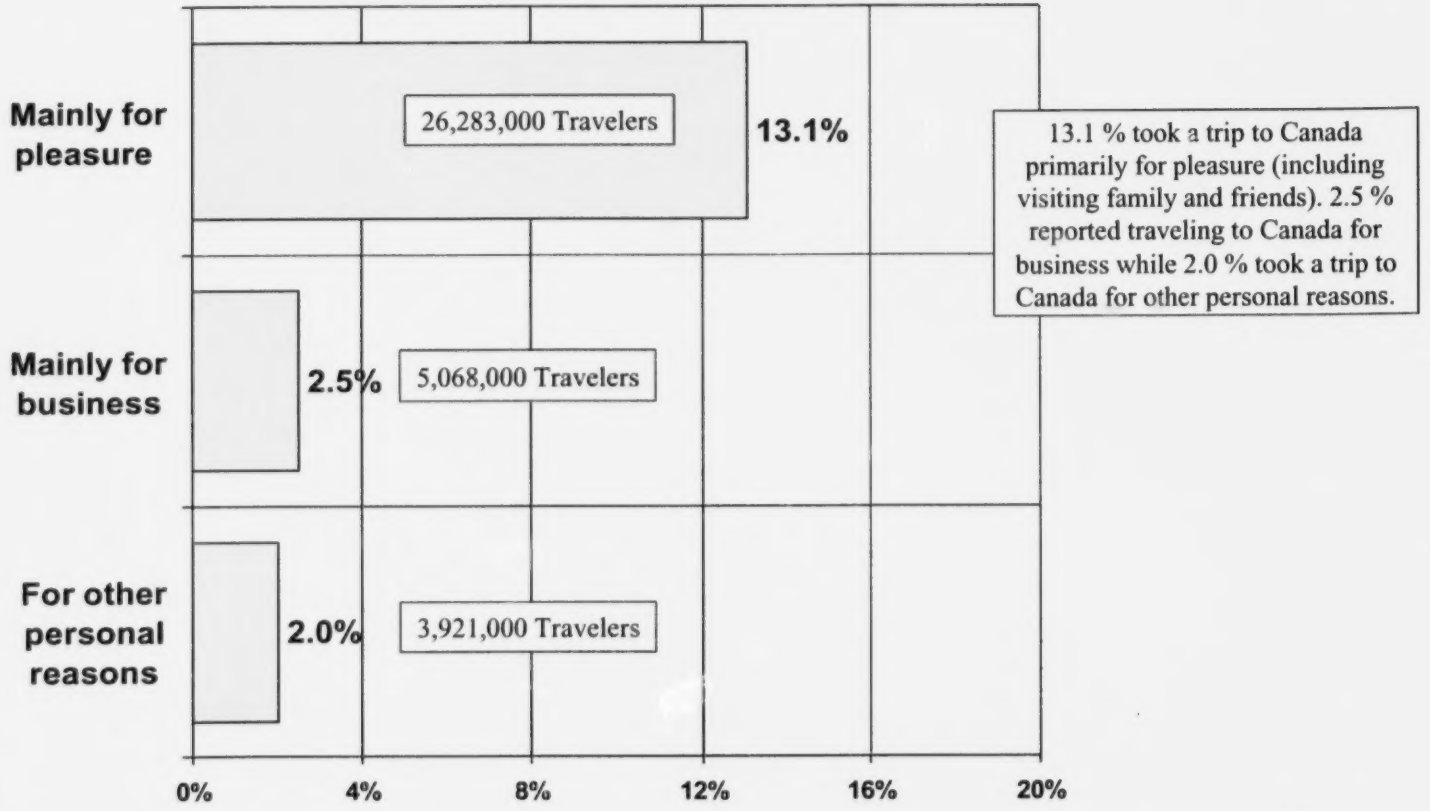


The seasonal travel patterns of U.S. visitors to Canada were consistent across all regions of the United States, with travel most frequent during the summer season. Travel was also more likely during the fall season, than during the spring and winter travel seasons. Regions which border with (e.g., Pacific, New England, Middle Atlantic, East North Central) exhibited a higher incidence of pleasure travel to Canada during the off-peak travel seasons (relative to other regions), indicating that border markets are of greater strategic significance during the winter/spring/fall. Travel from regions farther away from Canada was more concentrated during the summer travel season.

Percent of U.S. Population Taking At Least One Trip in Last two years

By Reason for Travel

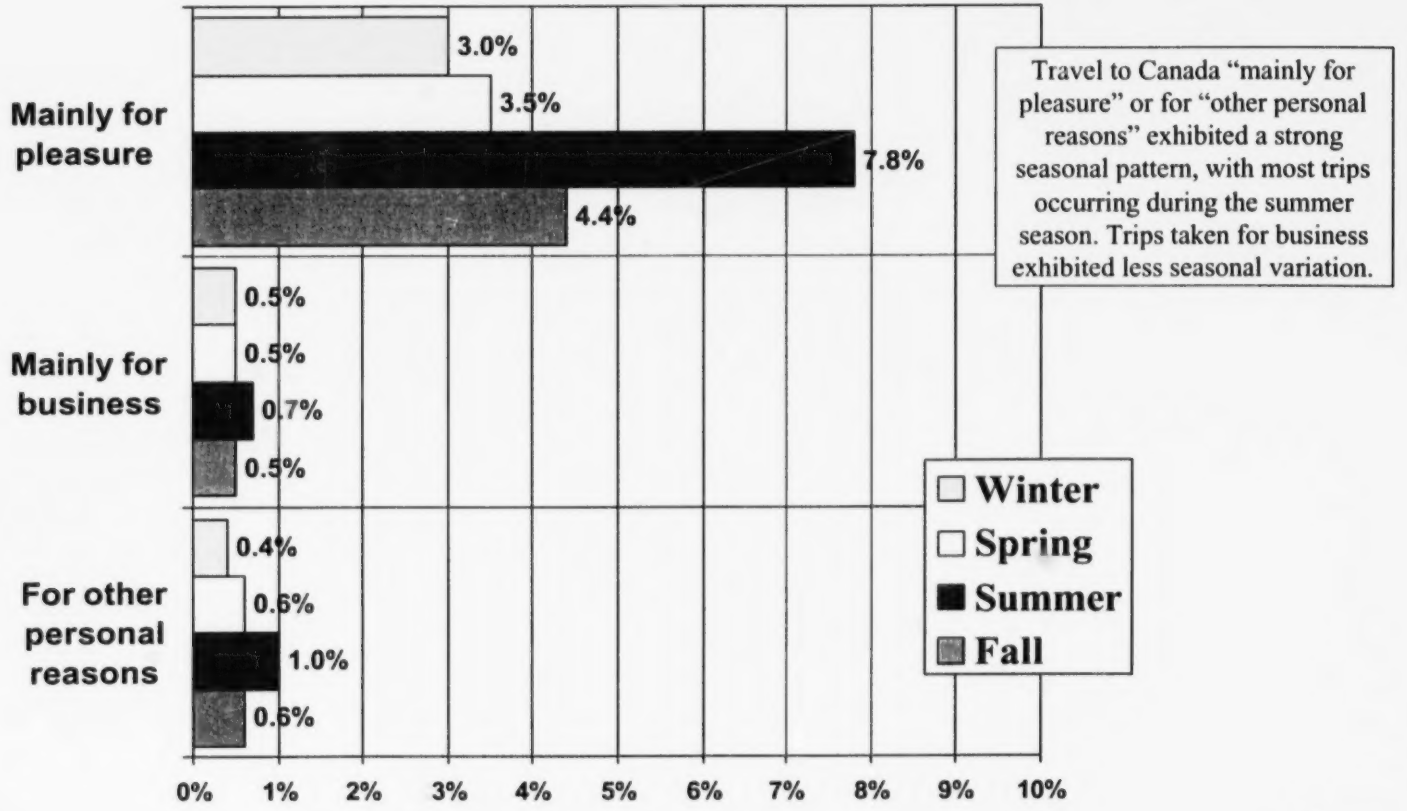
Base: United States Residents (18 Years or Older)



Percent of U.S. Population Taking At Least One Trip in Last two years

By Reason for Travel and By Travel Season

Base: United States Residents (18 Years or Older)

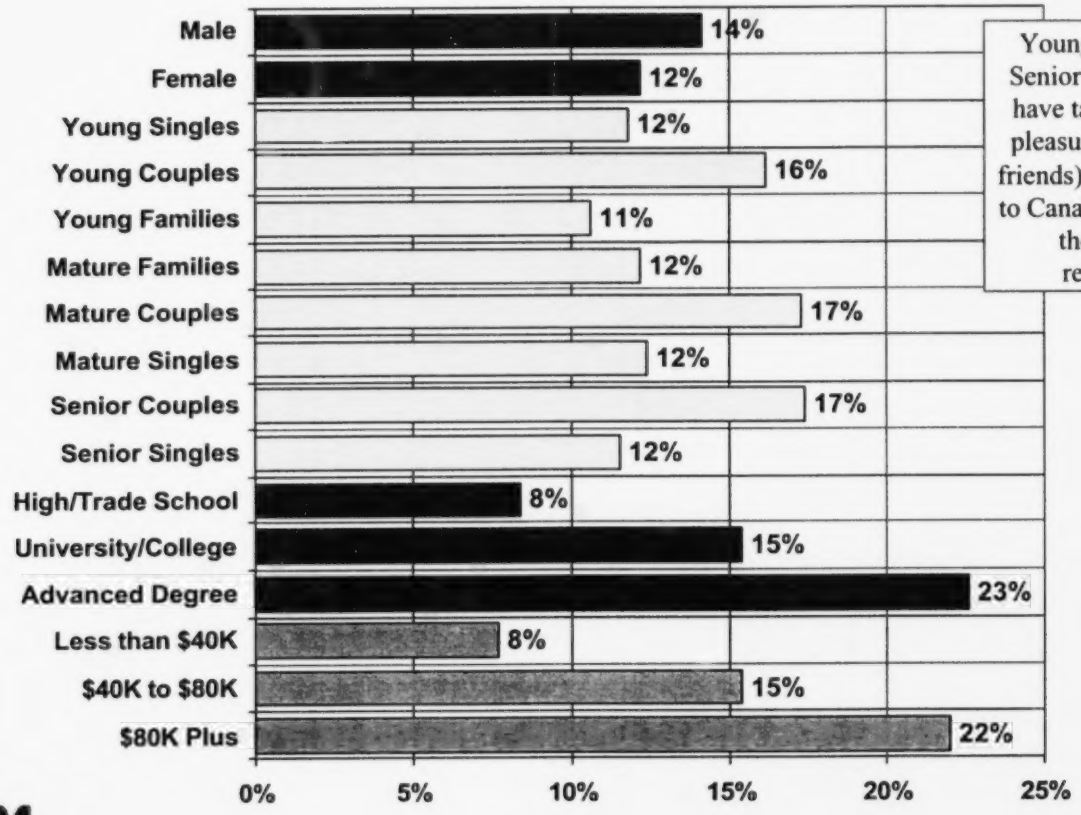


Travel to Canada "mainly for pleasure" or for "other personal reasons" exhibited a strong seasonal pattern, with most trips occurring during the summer season. Trips taken for business exhibited less seasonal variation.

Percent of Total U.S. Population Taking At Least One Pleasure Trip in Last two years

Trips Taken "Mainly for Pleasure":By Demographics

Base: United States Residents (18 Years or Older)

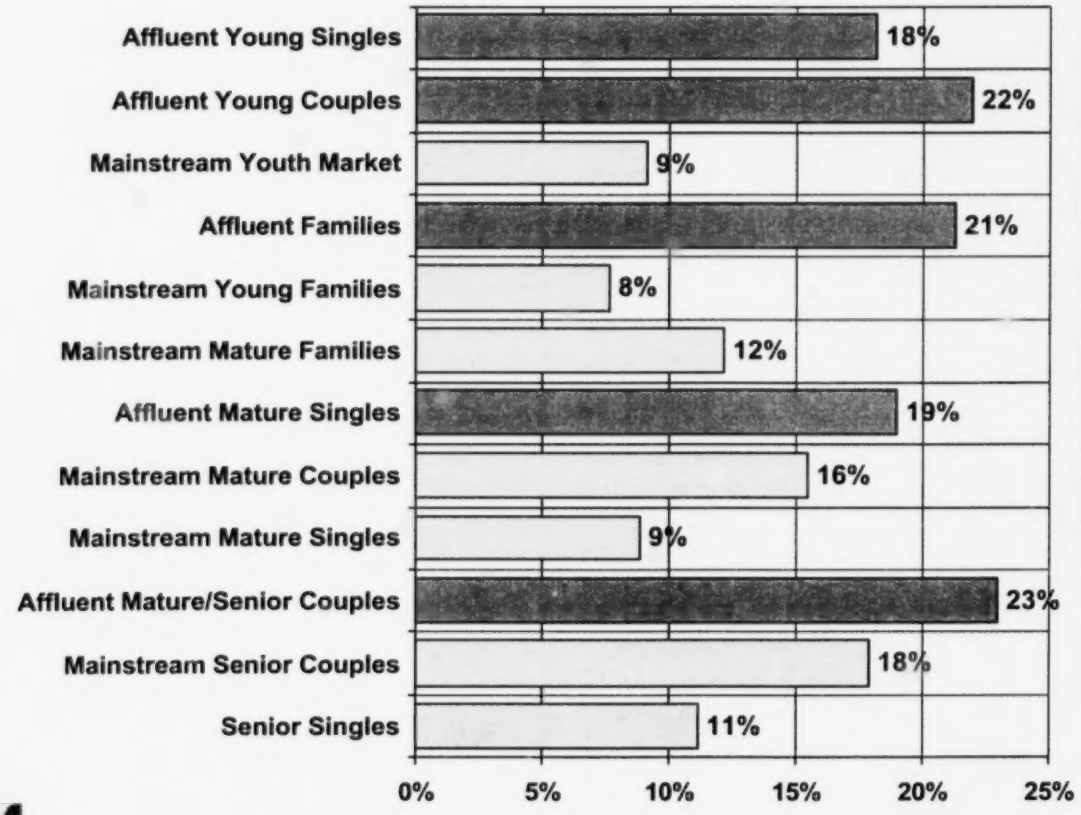


Young Couples, Mature Couples and Senior Couples were the most likely to have taken a trip to Canada mainly for pleasure (including visiting family and friends). The incidence of pleasure travel to Canada also increased as a function of the household income and the respondent's education level.

Percent of Total U.S. Population Taking At Least One Pleasure Trip in Last two years

Trips Taken "Mainly for Pleasure": By Market Segment

Base: United States Residents (18 Years or Older)

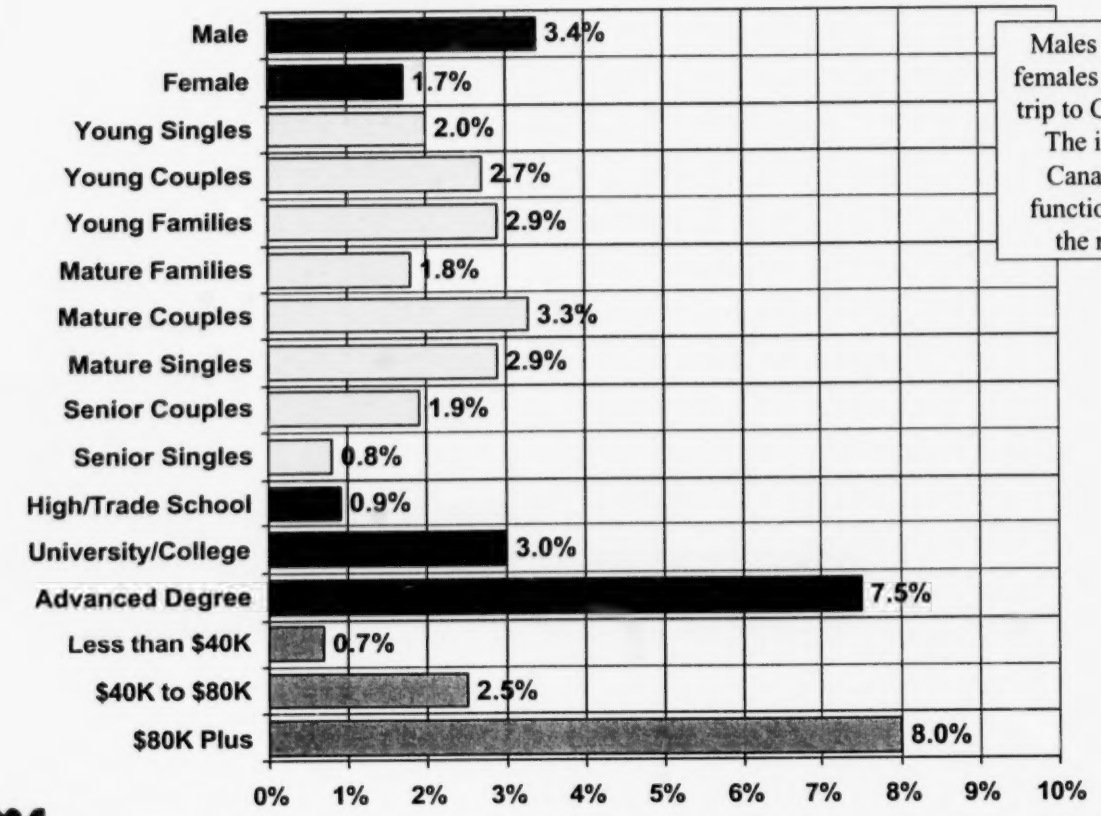


The affluent segments are much more likely to have taken a pleasure trip to Canada during the past two years. However, Mainstream Mature Couples and Mainstream Senior Couples are more likely to have taken a pleasure trip to Canada than other mainstream segments. The Mainstream Youth Market, Mainstream Young Families and Mainstream Mature Singles were the least likely to have taken a pleasure trip to Canada during the past two years.

Percent of Total U.S. Population Taking At Least One Business Trip in Last two years

Trips Taken "Mainly for Business": By Demographics

Base: United States Residents (18 Years or Older)

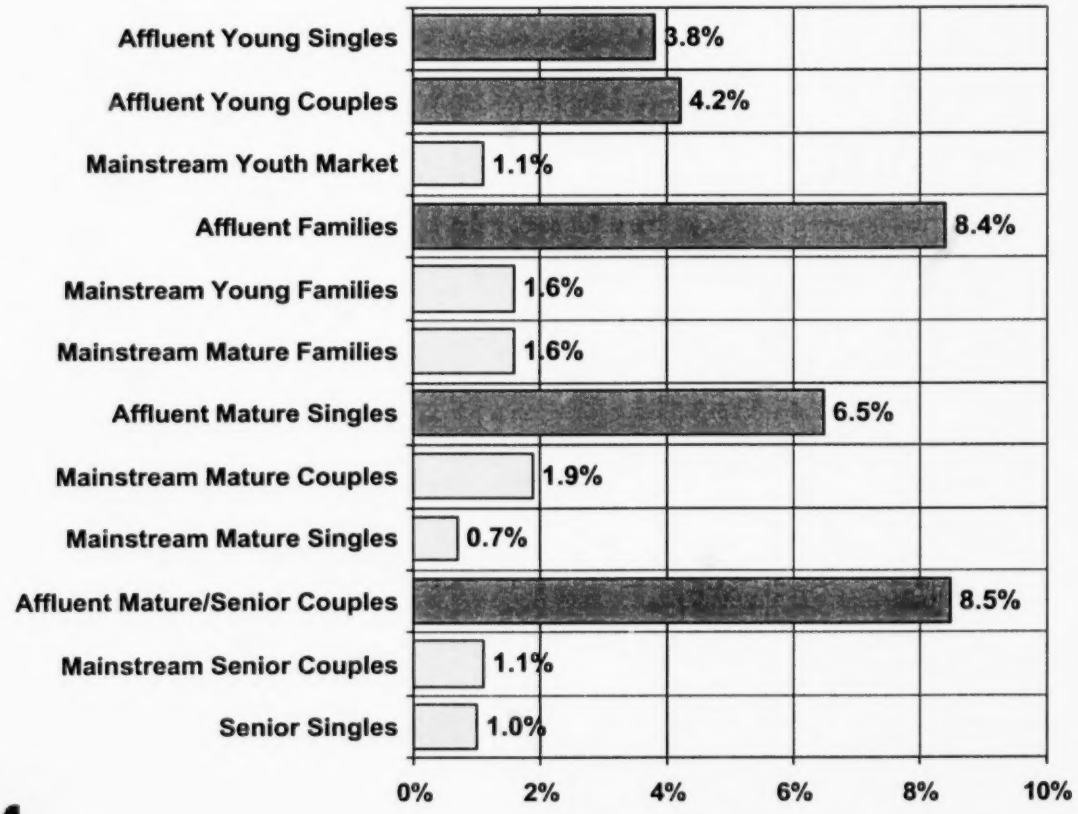


Males (3.4 %) were twice as likely as females (1.7 %) to have taken a business trip to Canada during the last two years. The incidence of business travel to Canada also increased sharply as a function of the household income and the respondent's education level.

Percent of Total U.S. Population Taking At Least One Business Trip in Last two years

Trips Taken "Mainly for Business": By Market Segment

Base: United States Residents (18 Years or Older)



The affluent segments were much more likely to have taken a business trip to Canada during the past two years. Business travel was especially likely among the Affluent Families, Affluent Mature Singles, and Affluent Mature and Senior Couples segments.

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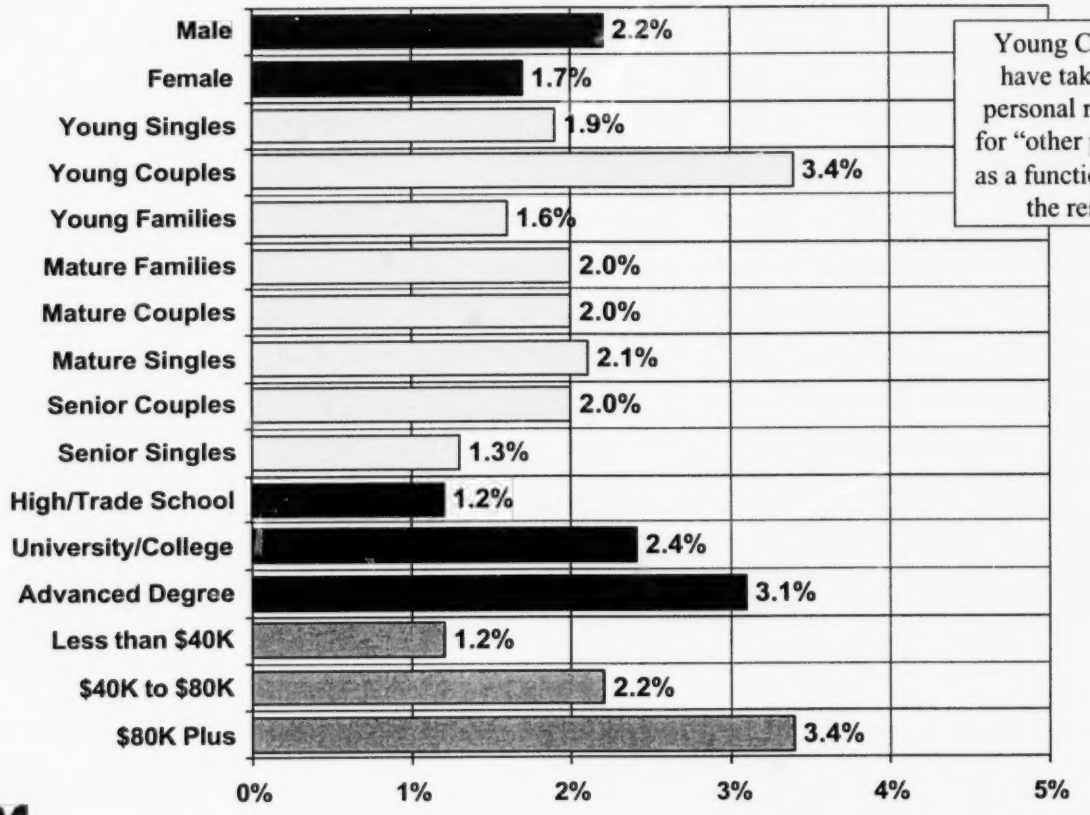
Percent of U.S. Population Taking At Least One Trip for "Other Personal Reasons" in Last two years

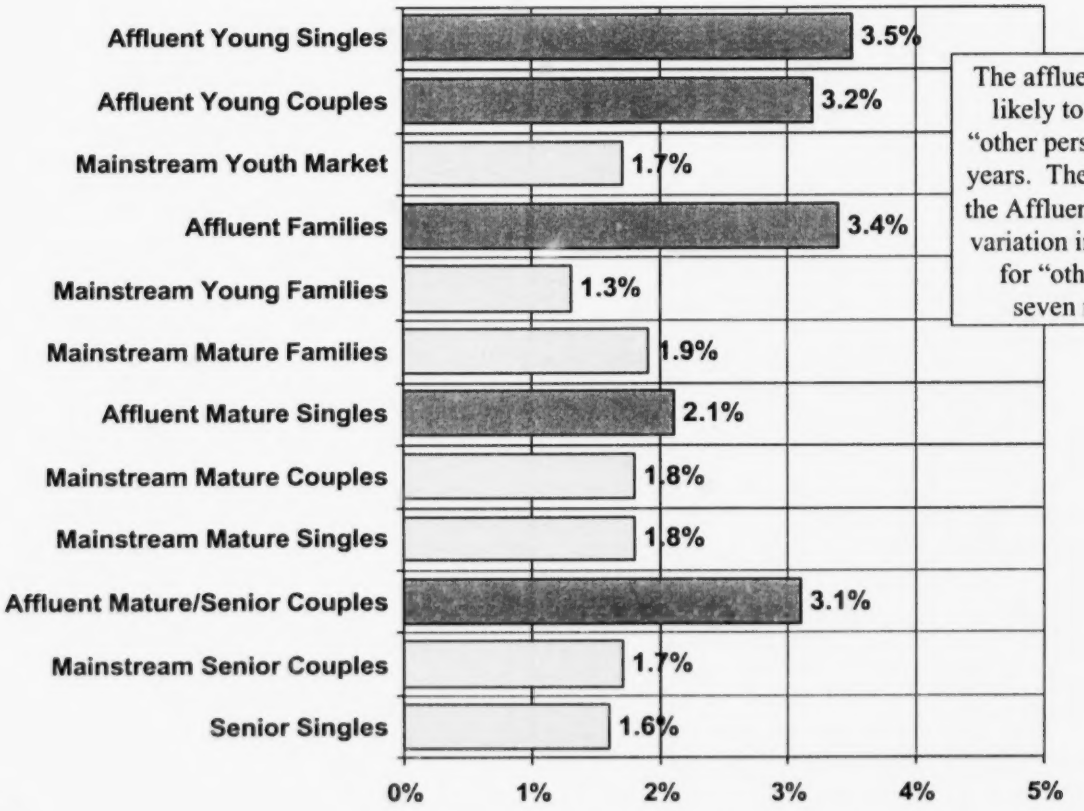
Trips Taken for "Other Personal Reasons": By Demographics

Base: United States Residents (18 Years or Older)



Young Couples are especially likely to have taken a trip to Canada for "other personal reasons". The incidence of trips for "other personal reasons" also increases as a function of the household income and the respondent's education level.

Percent of U.S. Population Taking At Least One Trip for "Other Personal Reasons" in Last Two Years:
Trips By Market Segment
Base: United States Residents (18 Years or Older)

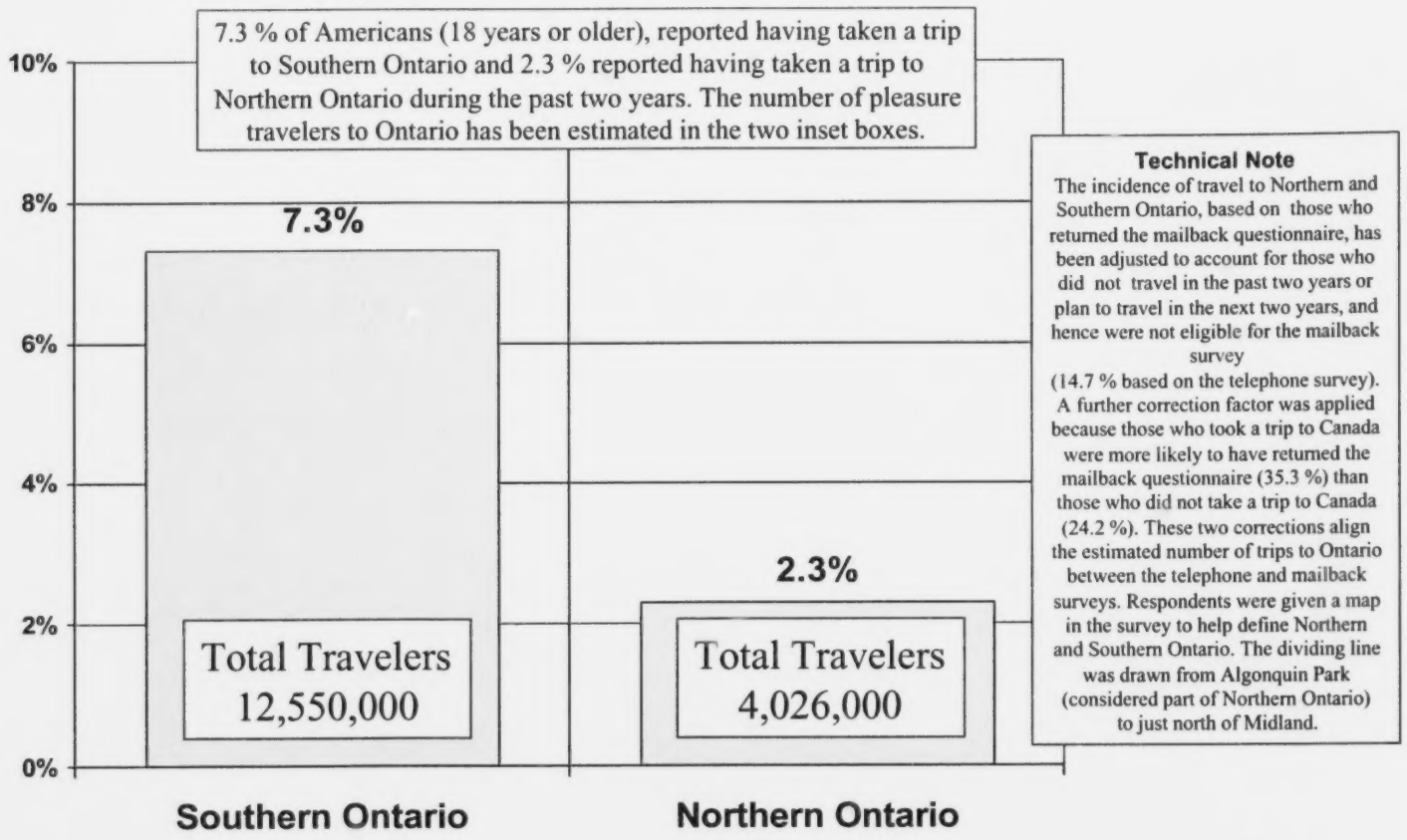


The affluent segments were generally more likely to have taken a trip to Canada for "other personal reasons" during the past two years. The one exception to this pattern was the Affluent Mature Singles. There was little variation in the incidence of trips to Canada for "other personal reasons" within the seven mainstream market segments.

Percent of U.S. Population (18 Plus)

Pleasure Trips: Northern and Southern Ontario

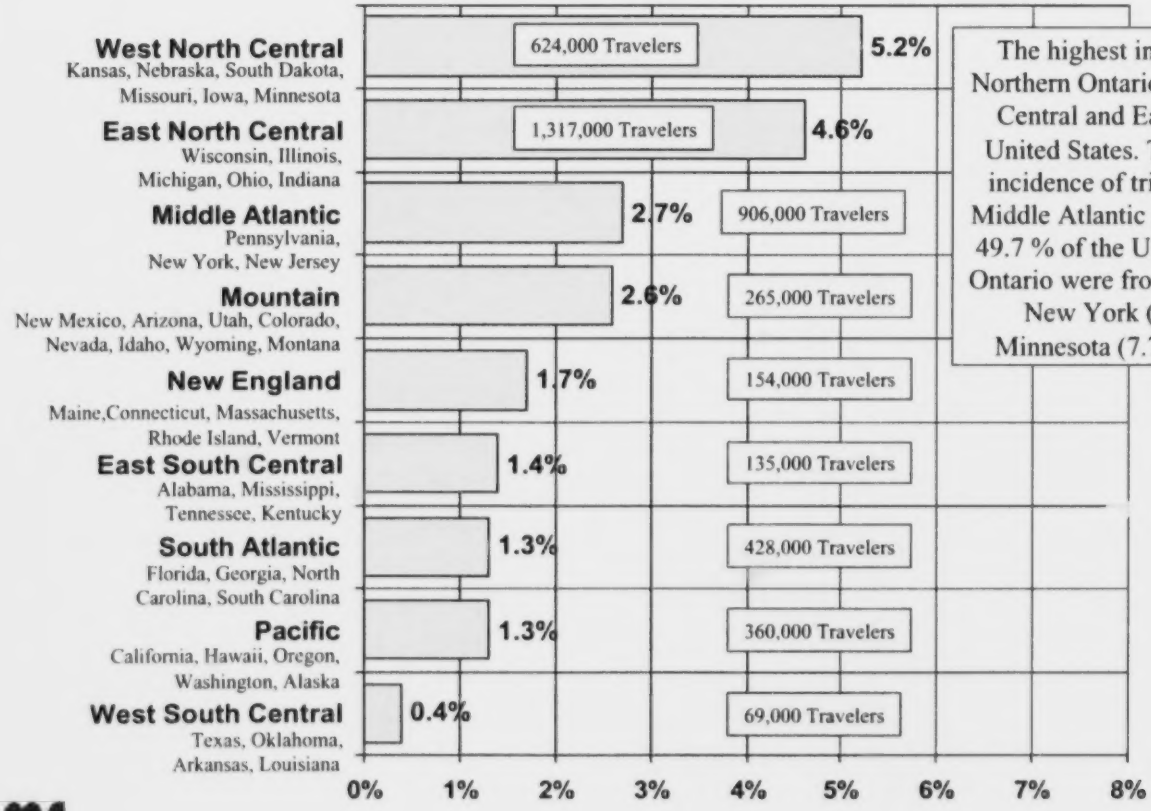
During Past Two Years: Mailback Survey (United States)



U.S. Population (18 Plus)

Percent Taking Overnight Pleasure Trips to Northern Ontario

Base: United States Residents (18 Years or Older)

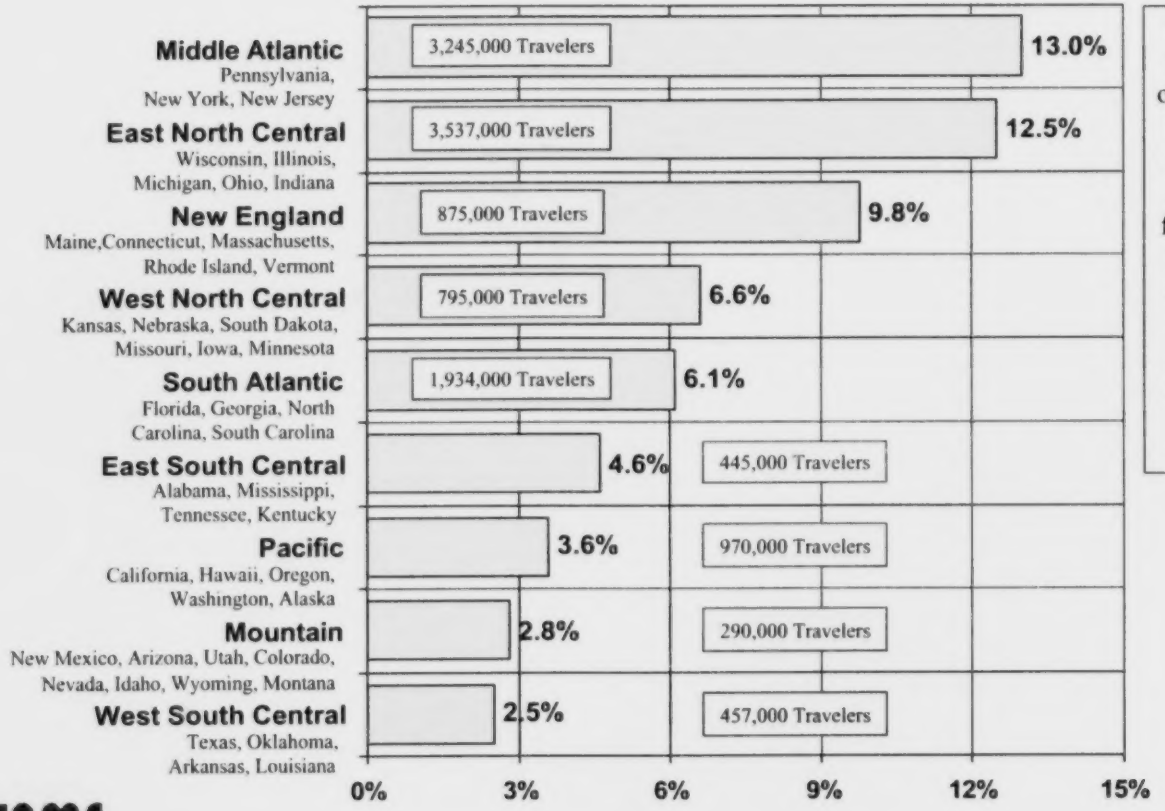


The highest incidence of pleasure travelers to Northern Ontario was observed in the West North Central and East North Central regions of the United States. There was also an above average incidence of trips to Northern Ontario from the Middle Atlantic and Mountain regions of the U.S. 49.7 % of the U.S. pleasure travelers to Northern Ontario were from five states: Michigan (12.4 %), New York (10.2 %), Wisconsin (9.6 %), Minnesota (7.7 %) and Pennsylvania (4.8 %).

U.S. Population (18 Plus)

Percent Taking Overnight Pleasure Trips to Southern Ontario

Base: United States Residents (18 Years or Older)

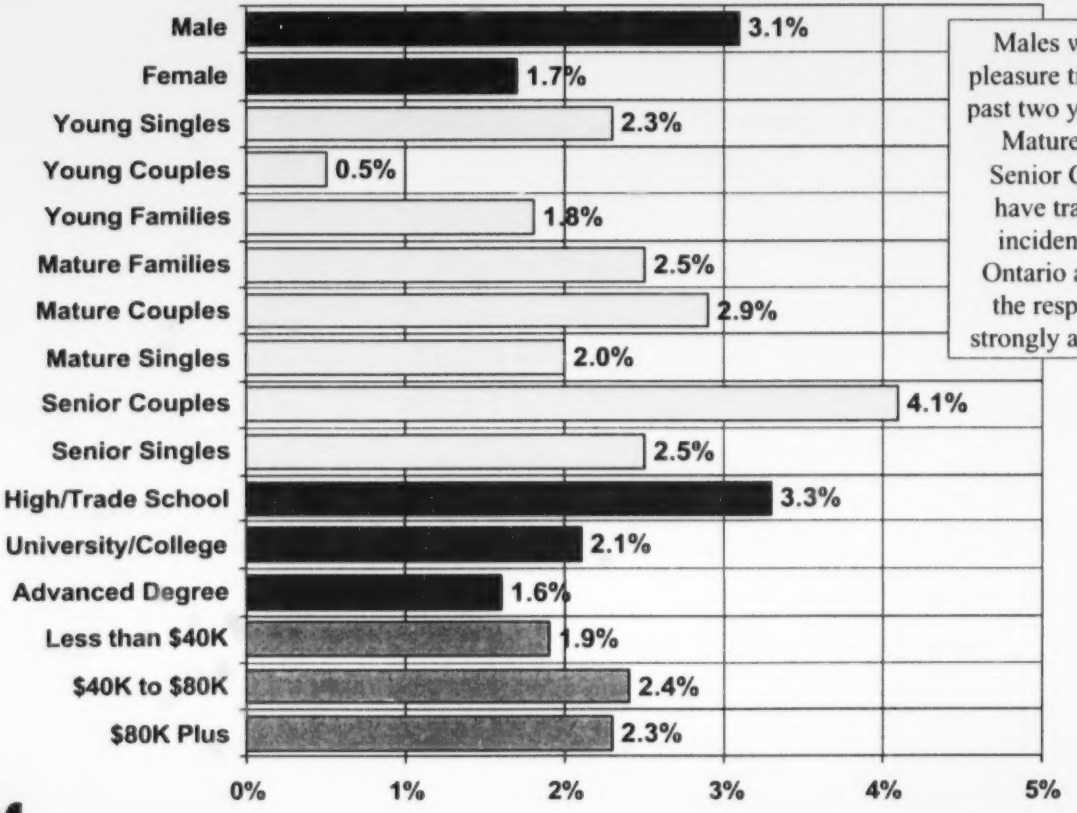


The highest incidence of pleasure travelers to Southern Ontario was observed in the Middle Atlantic and the East North Central regions of the United States. There was an above average incidence of travel from the New England states, West North Central and South Atlantic regions. 48.0 % of the travelers to Southern Ontario were from five states: New York State (16.3 %), Michigan (11.7 %), Ohio (8.8 %), Pennsylvania (5.8 %) and California (5.4 %).

Percent of Total U.S. Population Taking Pleasure Trips to Northern Ontario in Last two years

Northern Ontario: By Demographics

Base: United States Residents (18 Years or Older)

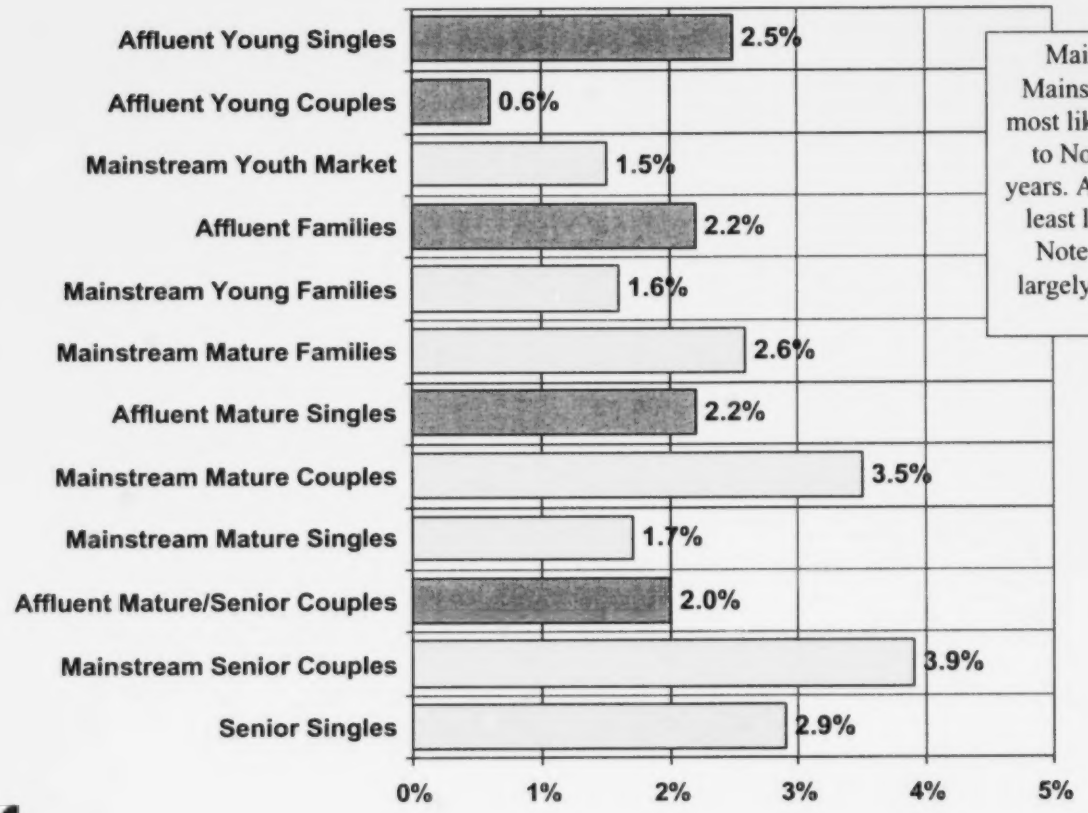


Males were more likely to have taken a pleasure trip to Northern Ontario during the past two years than females. Young Singles, Mature Families, Mature Couples and Senior Couples were also more likely to have traveled to Northern Ontario. The incidence of pleasure trips to Northern Ontario actually declined as a function of the respondent's education and was not strongly associated with household income.

Percent of Total U.S. Population Taking Pleasure Trips to Northern Ontario in Last two years

Northern Ontario: By Market Segment

Base: United States Residents (18 Years or Older)

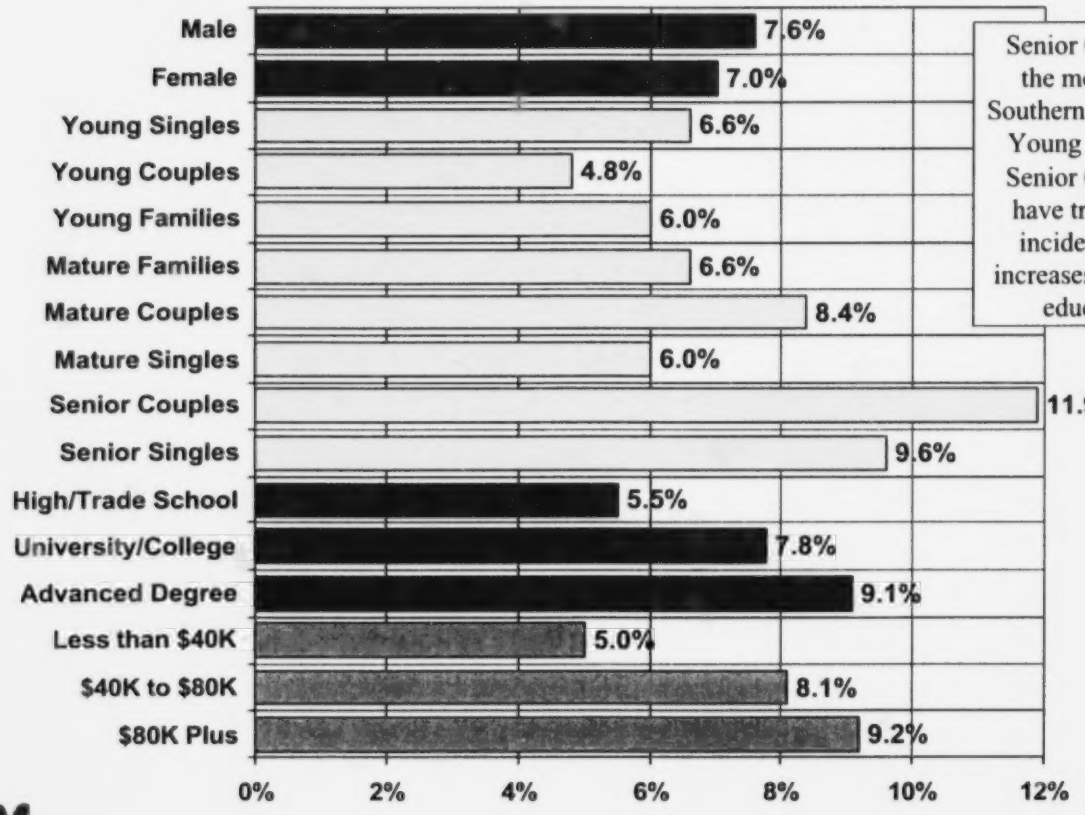


Mainstream Mature Couples and Mainstream Senior Couples were the most likely to have taken a pleasure trip to Northern Ontario in the past two years. Affluent Young Couples were the least likely to have taken such a trip. Note that household affluence was largely unrelated to travel to Northern Ontario.

Percent of Total U.S. Population Taking Pleasure Trips to Southern Ontario in Last two years

Southern Ontario: By Demographics

Base: United States Residents (18 Years or Older)

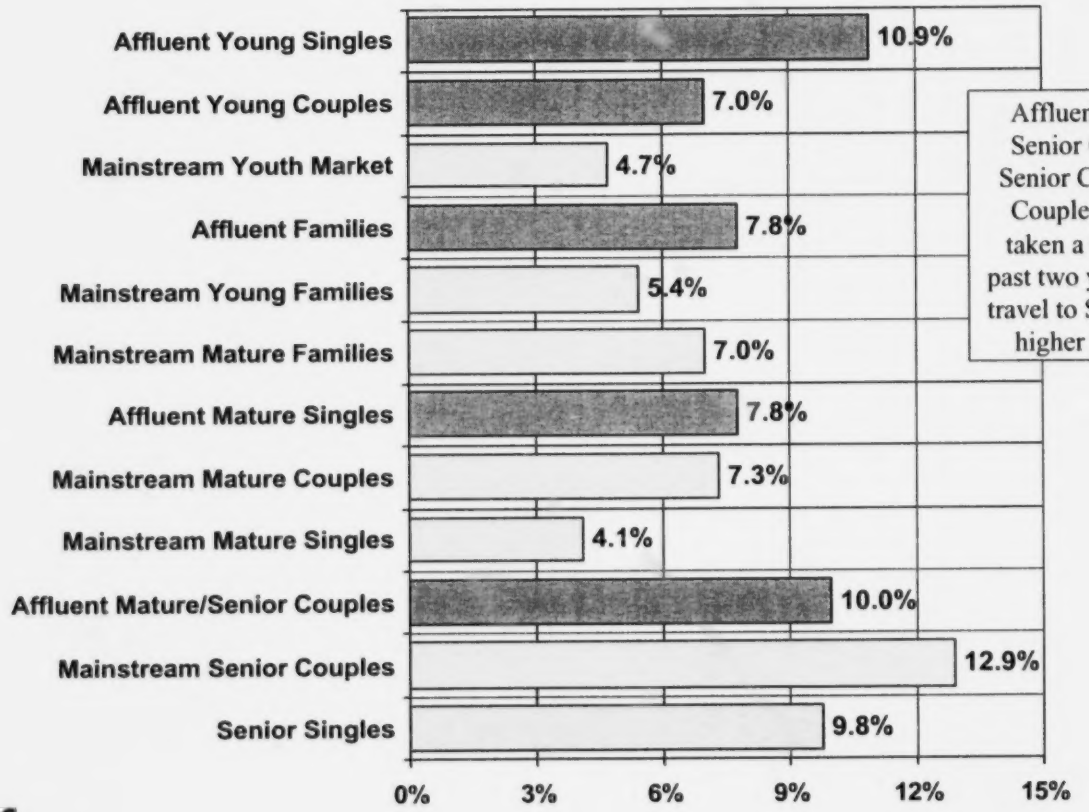


Senior Couples and Senior Singles were the most likely to have taken a trip to Southern Ontario during the past two years. Young Singles and Mature Couples and Senior Couples were also more likely to have traveled to Southern Ontario. The incidence of trips to Southern Ontario increases as a function of the respondent's education and household income.

Percent of Total U.S. Population Taking Pleasure Trips to Southern Ontario in Last two years

Southern Ontario: By Market Segment

Base: United States Residents (18 Years or Older)



Affluent Young Singles, Mainstream Senior Couples, Affluent Mature and Senior Couples and Mainstream Senior Couples were the most likely to have taken a trip to Southern Ontario in the past two years. Note that the incidence of travel to Southern Ontario was somewhat higher among the affluent segments.

Section Four

Travel within Canada

Domestic Travel Patterns

Travel within Canada

- Key Findings -

On average, Canadian residents took 4.0 intra-provincial pleasure trips and 1.7 inter-provincial pleasure trips during the last two years. The percent of domestic pleasure trips that were intra-provincial (relative to the percent that were inter-provincial) was highest for the larger and most populous provinces: Ontario, Quebec and British Columbia. In the Maritime region and in Manitoba and Saskatchewan, the number of intra-provincial trips was comparable to the number of inter-provincial trips.

Ontario, Quebec, Alberta and British Columbia were the provinces most often traveled to by inter-provincial pleasure travelers. Typically, the highest incidence of travel was from the adjacent province(s) although there were certain exceptions to this pattern (e.g., trips from Alberta to Newfoundland were atypically high).

As with long haul travel from the U.S. to Canada, inter-provincial pleasure travel was more concentrated during the summer than intra-provincial travel. This suggests that the intra-provincial market has greater strategic importance during the winter, spring and fall, while inter-provincial travel is strategically important during the summer.

As with travel patterns in general, domestic travel increases with education level and household income. But given the relative size of the mainstream segments, the mainstream markets (e.g., Mainstream Youth Market, Mainstream Mature Couples, Mainstream Mature Seniors) actually account for a greater number of domestic trips, and should be given special consideration in the development of domestic marketing and advertising strategies.

Travel within Canada

- Research Method -

Travel in Canada by Canadian residents during the past two years that was mainly for pleasure (including visiting family and friends) was assessed in the telephone survey.

Respondents were asked:

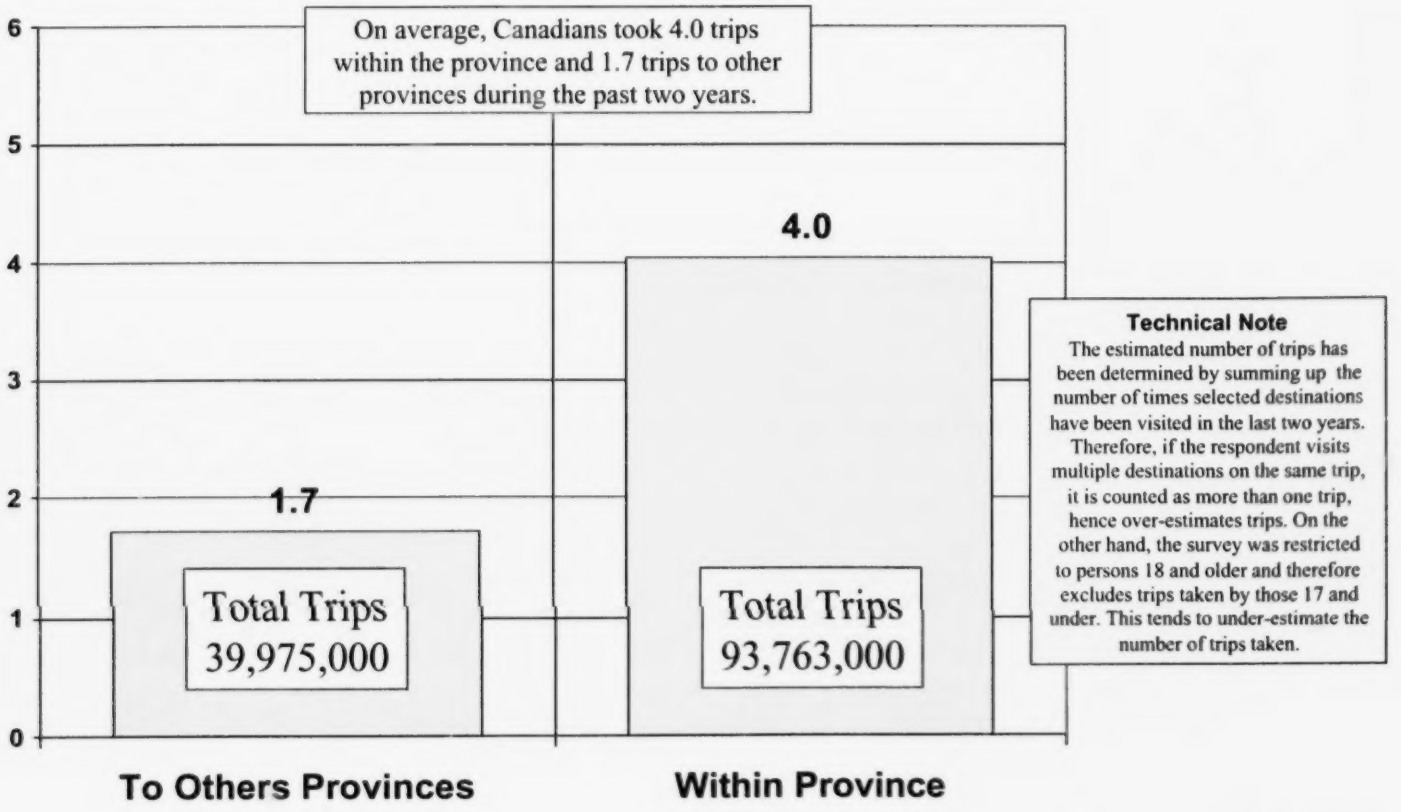
- How many overnight trips they had taken in the last two years to each province
- What season of the year they had taken these trips
- Why they had taken these trips (e.g., mainly for pleasure including trips to visit friends and relatives, mainly for business, mainly for other personal reasons or for some other reason)

This section of the overview report explores pleasure travel within Canada by residents of Canada.

Average Number of Canadian Pleasure Trips Taken in Last two years

Average Number of Domestic Trips Taken

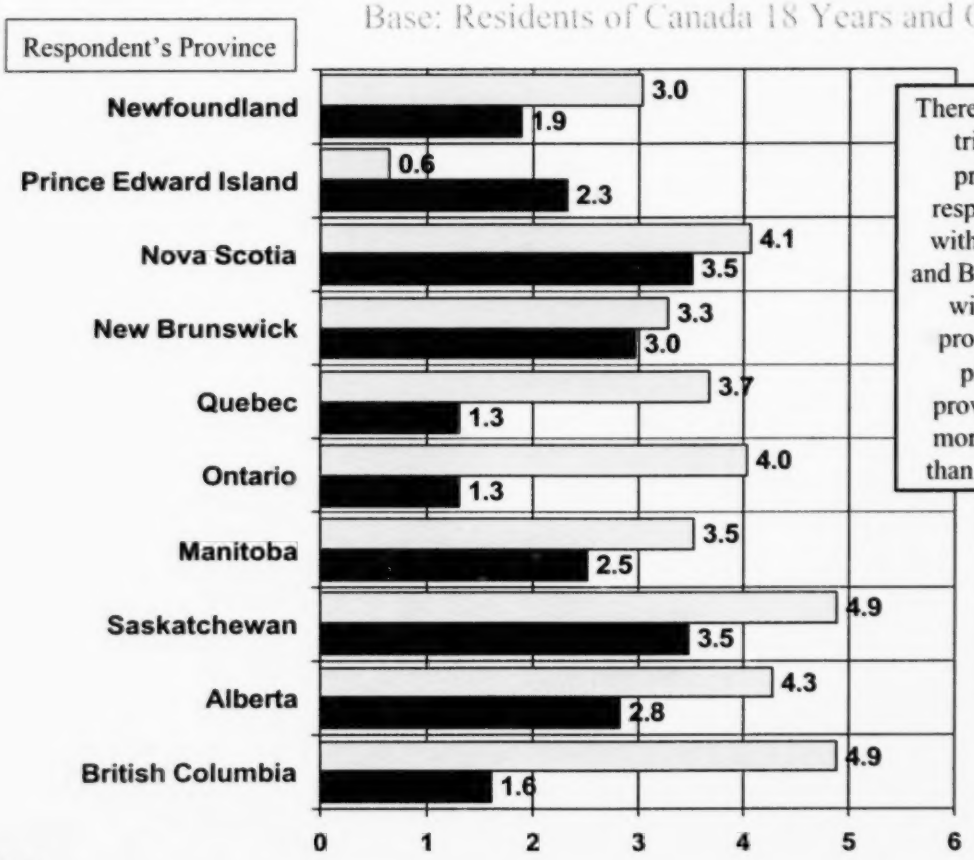
Base: Residents of Canada 18 Years and Older



Average Number of Canadian Pleasure Trips Taken in Last two years

Average Number of Domestic Trips By Province

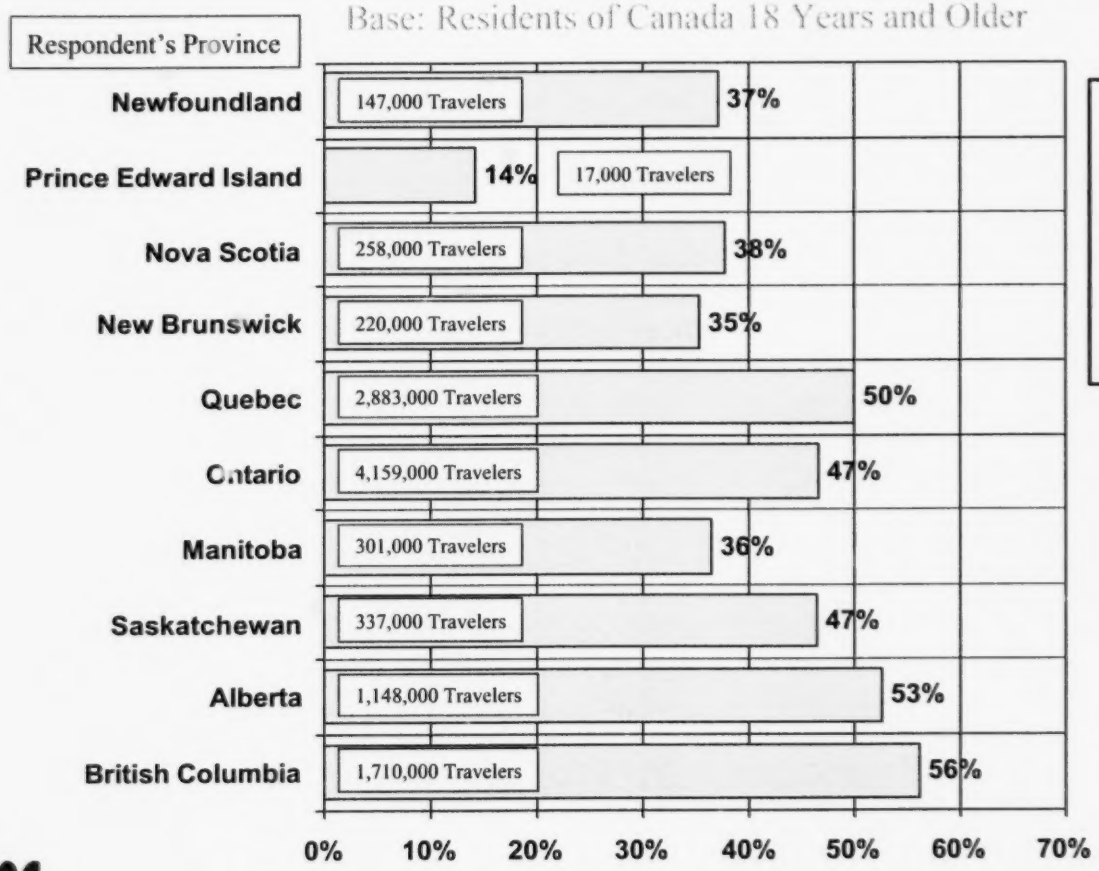
Base: Residents of Canada 18 Years and Older



There was considerable variation in the number of trips taken within the province and to other provinces depending on the province of the respondent. For example, those from provinces with large populations such as Quebec, Ontario and British Columbia took considerably more trips within their own province than trips to other provinces. Those from smaller provinces took proportionately more trips outside of their province. In fact, respondents from P.E.I. were more likely to have traveled to other provinces than to have traveled within their own province.

Percent of Canadian Population Taking At Least One Within Province Overnight, Pleasure Trip in the Last Two Years

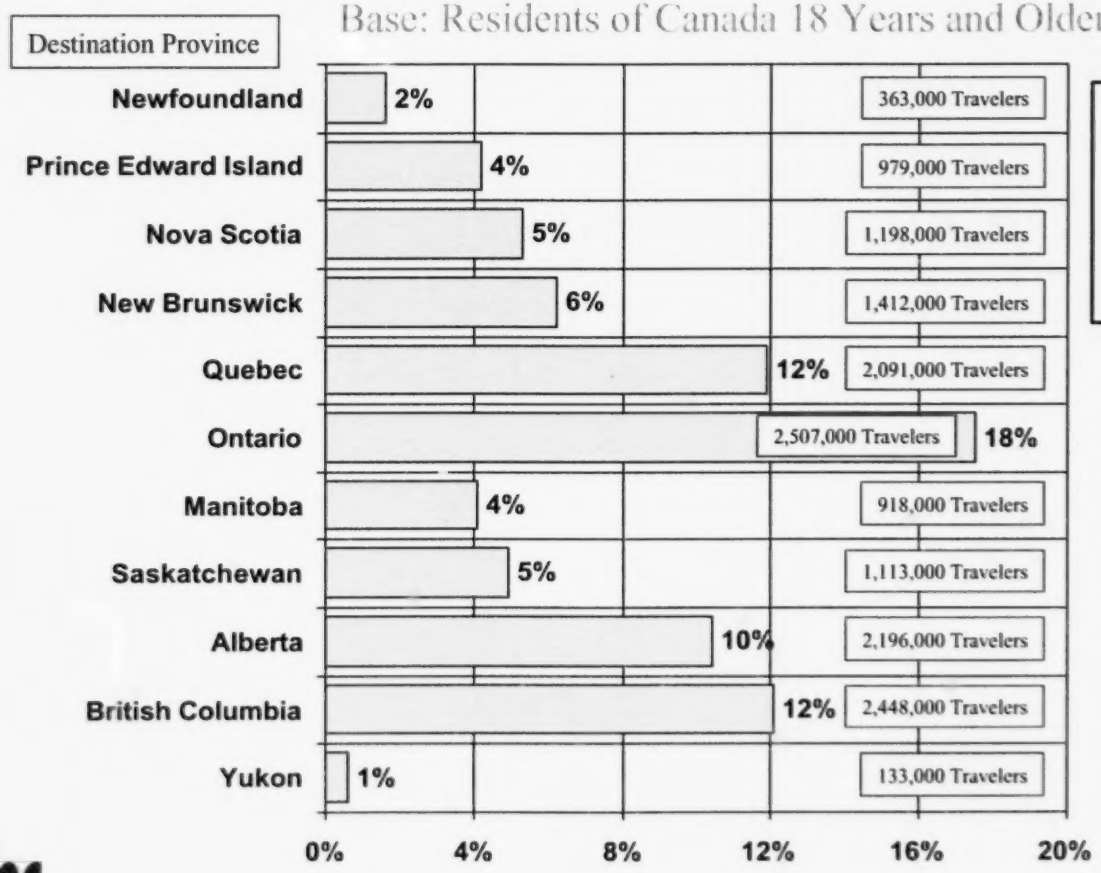
Base: Residents of Canada 18 Years and Older



Respondents from Quebec, Ontario, Alberta and British Columbia were the most likely to have taken a trip within their own province during the past two years. Those from Prince Edward Island were the least likely to have taken a pleasure trip within their own province.

Percent of Canadian Adult Population Taking An Overnight, Pleasure Trip To Another Province in the Last two years By Province Traveled To (Excluding Within Province Trips)

Base: Residents of Canada 18 Years and Older

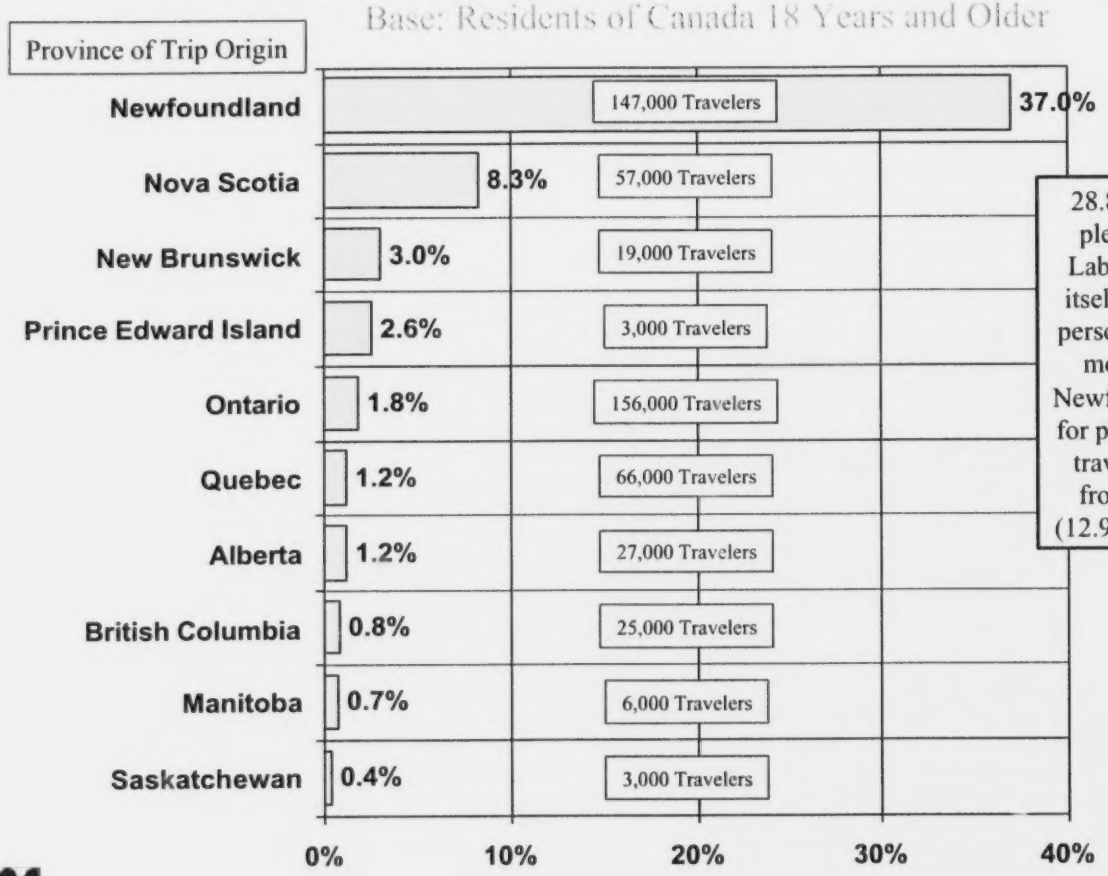


Ontario was the province most often visited by residents of Canada traveling to another province. Quebec, Alberta and British Columbia were also common destinations for pleasure trips to other provinces.

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Newfoundland/Labrador

Pleasure Trips to Newfoundland/Labrador

Base: Residents of Canada 18 Years and Older

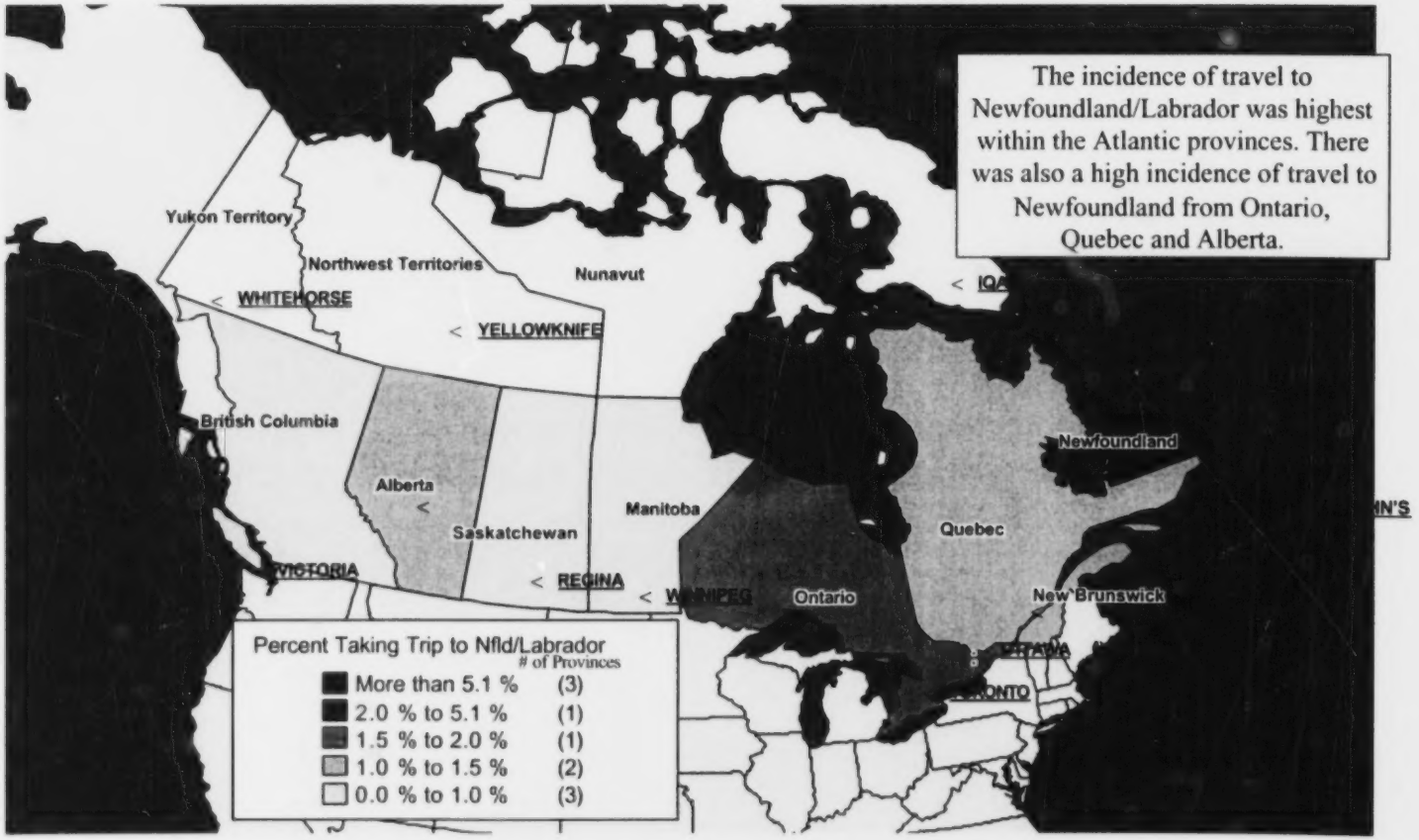


28.8 % of Canadians who took a pleasure trip in Newfoundland/ Labrador were from the province itself. In terms of other provinces, persons from Nova Scotia were the most likely to have traveled to Newfoundland in the past two years for pleasure. The largest number of travelers to Newfoundland were from Ontario (30.5 %), Quebec (12.9 %) and Nova Scotia (11.1 %).

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Newfoundland/Labrador

Pleasure Trips to Newfoundland/Labrador

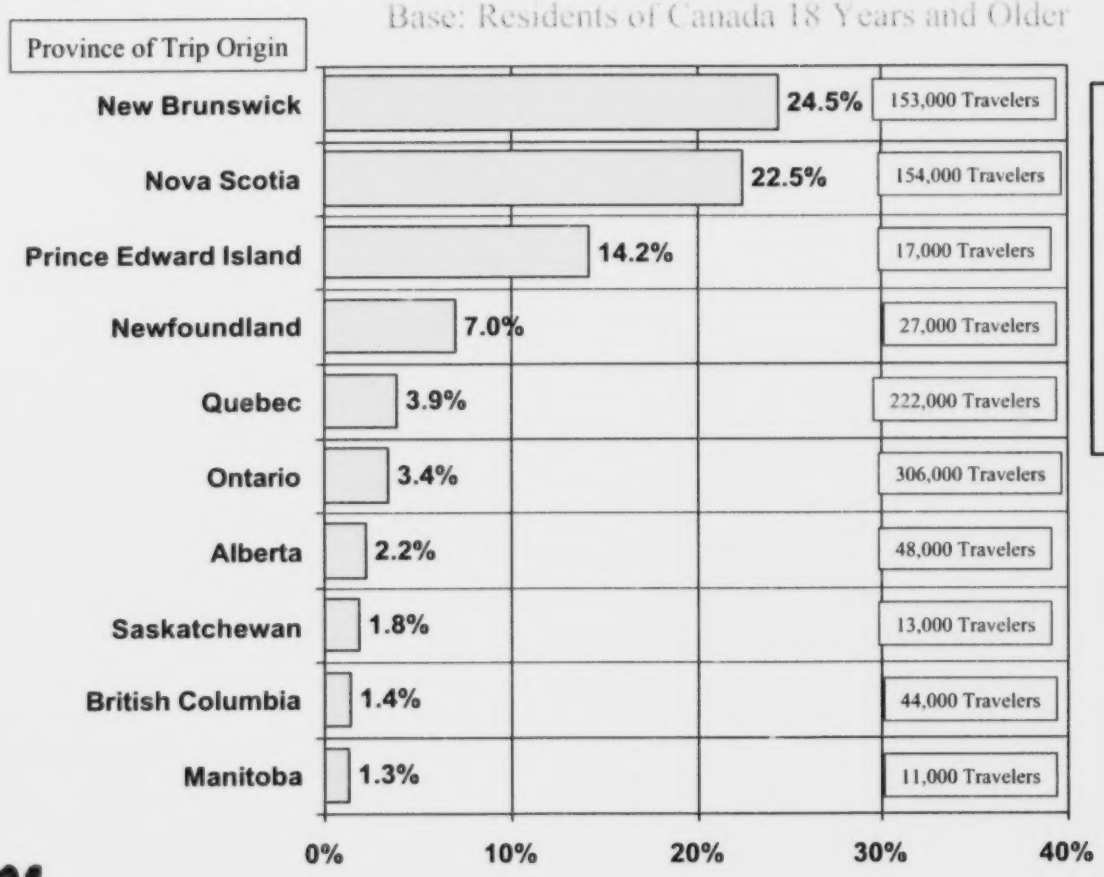
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Prince Edward Island

Pleasure Trips to Prince Edward Island

Base: Residents of Canada 18 Years and Older

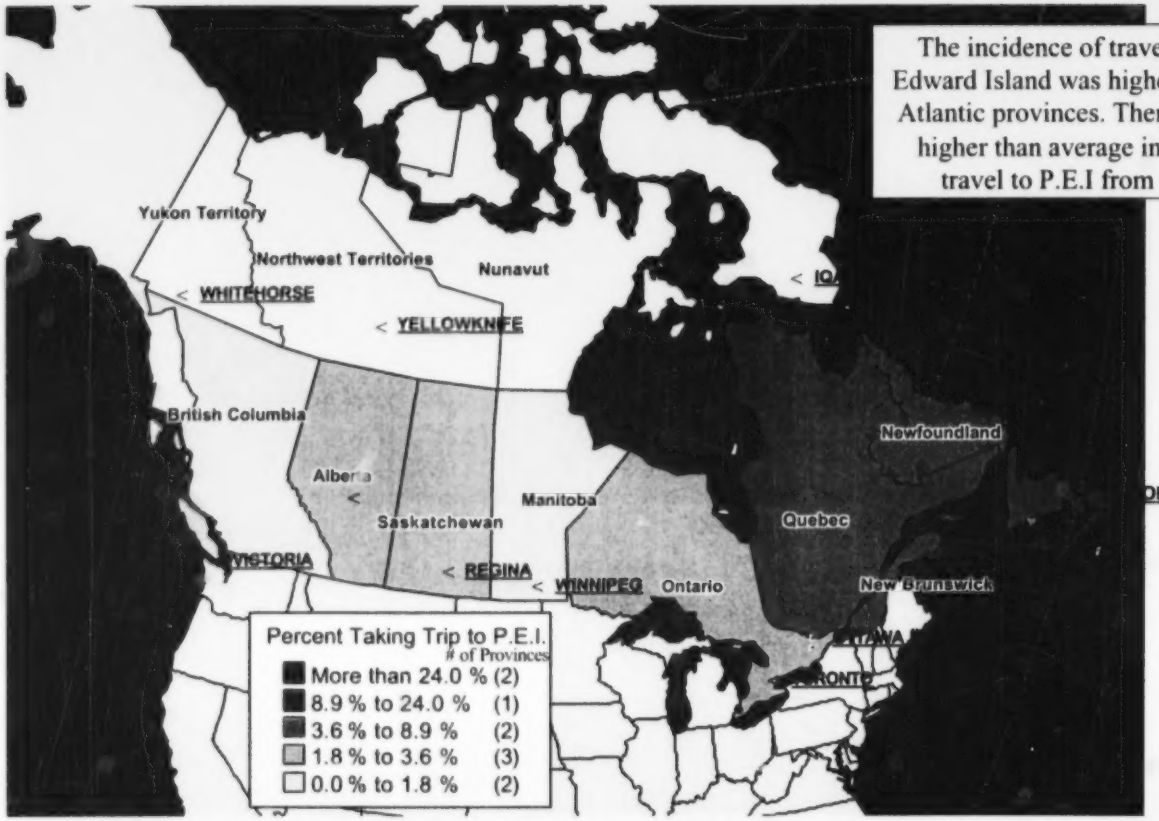


Only 1.7 % of the vacationers in Prince Edward Island were from P.E.I. In terms of other provinces, persons from New Brunswick and Nova Scotia were the most likely to have traveled to Prince Edward Island in the past two years. The largest number of travelers to Prince Edward Island were from Ontario (30.7 %), Quebec(22.2 %) and Nova Scotia (15.4 %).

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Prince Edward Island

Pleasure Trips to Prince Edward Island

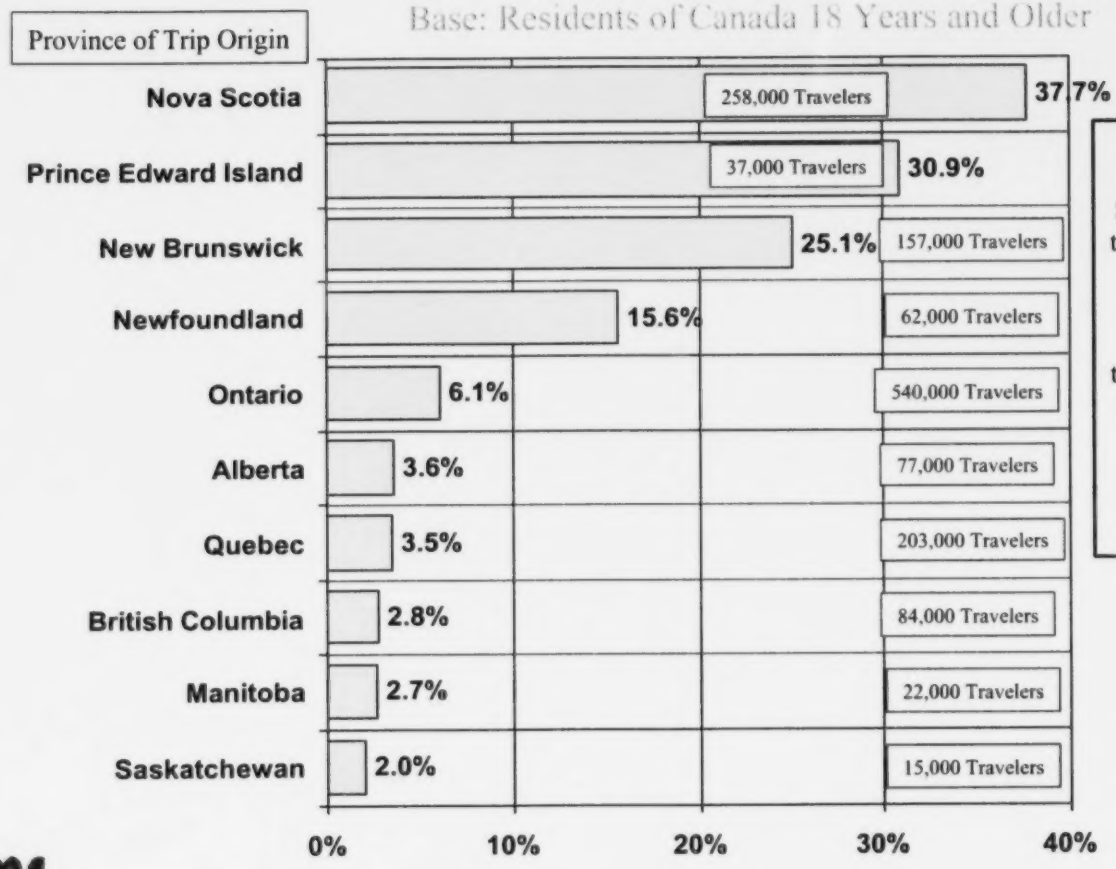
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Nova Scotia

Pleasure Trips to Nova Scotia

Base: Residents of Canada 18 Years and Older

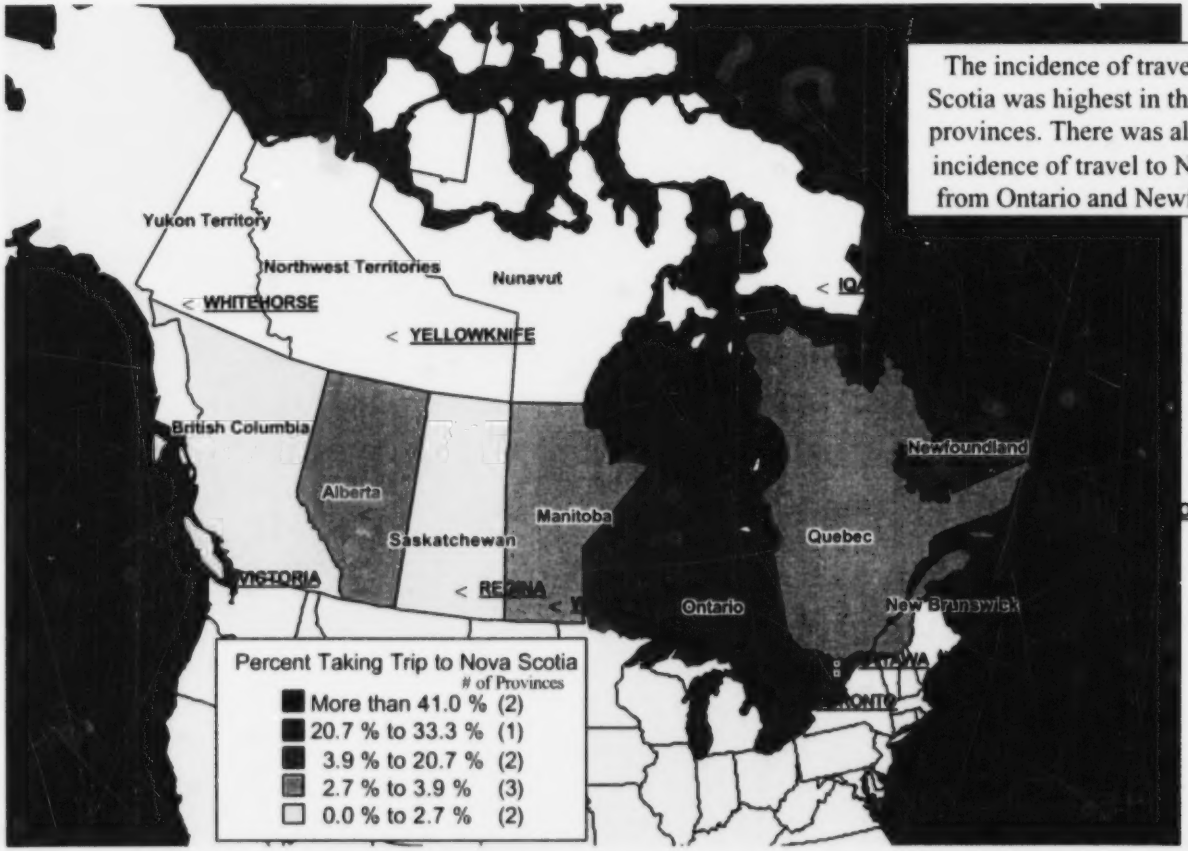


17.7 % of those who took an overnight pleasure trip in Nova Scotia were from Nova Scotia. In terms of other provinces, residents of Prince Edward Island, New Brunswick and Newfoundland were the most likely to have traveled to Nova Scotia in the past two years. The largest number of travelers to Nova Scotia were from Ontario (37.1 %), Quebec(13.9 %) and New Brunswick (10.8 %).

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Nova Scotia

Pleasure Trips to Nova Scotia

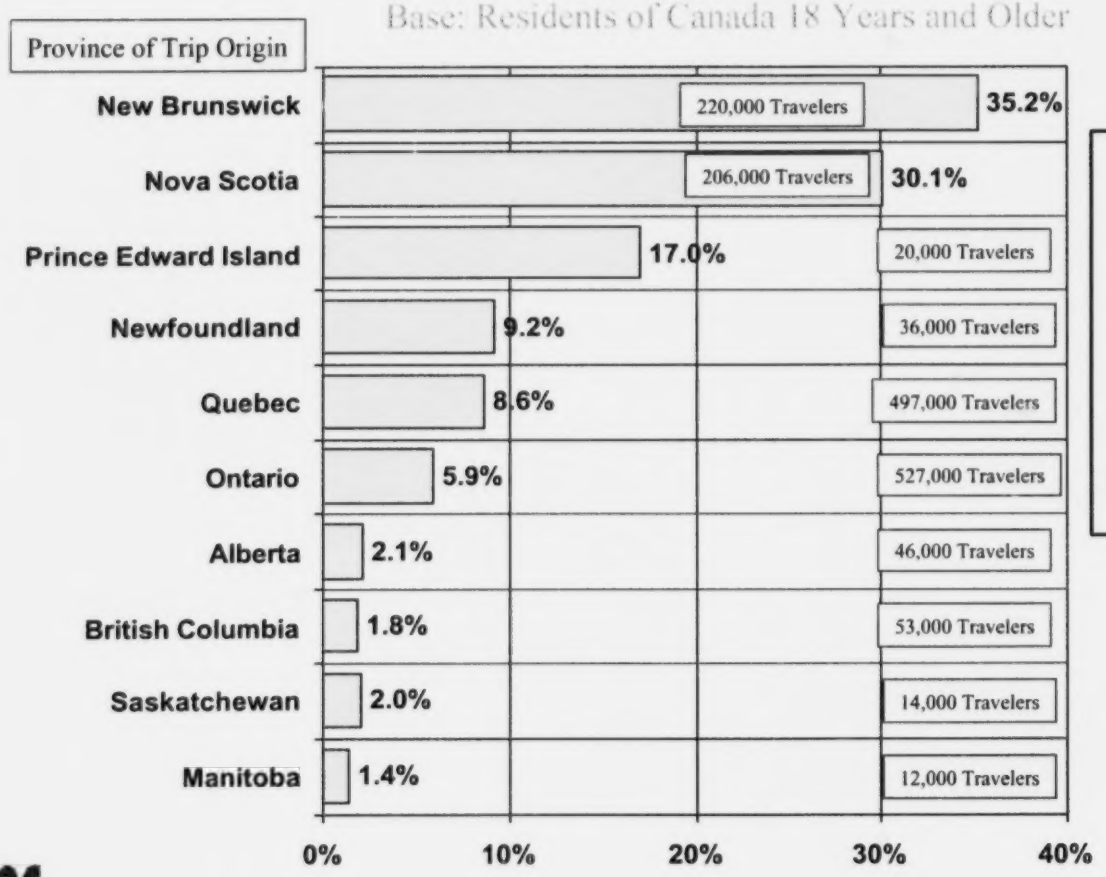
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to New Brunswick

Pleasure Trips to New Brunswick

Base: Residents of Canada 18 Years and Older

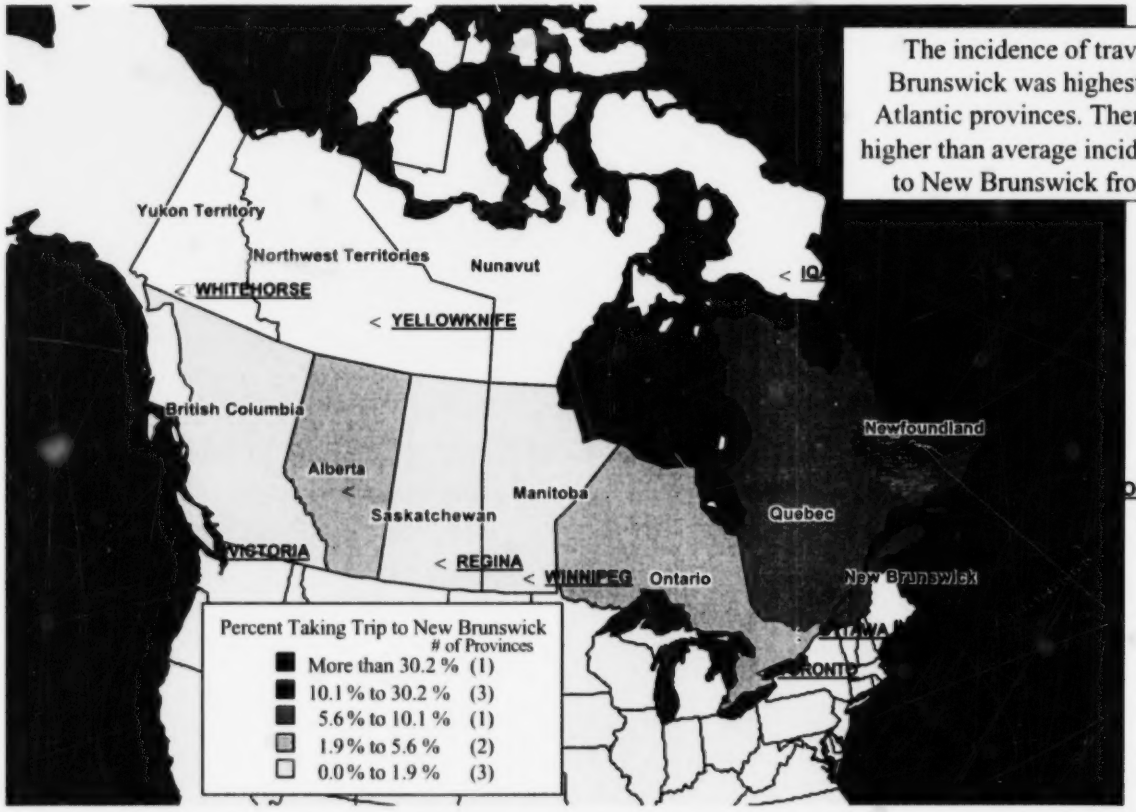


13.5 % of those who took a pleasure trip in New Brunswick were from the province. In terms of other provinces, residents of from Nova Scotia and Prince Edward Island were the most likely to have traveled to New Brunswick in the past two years. The largest number of travelers to New Brunswick were from Ontario (32.3 %), Quebec(30.4 %) and Nova Scotia (12.6 %).

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to New Brunswick

Pleasure Trips to New Brunswick

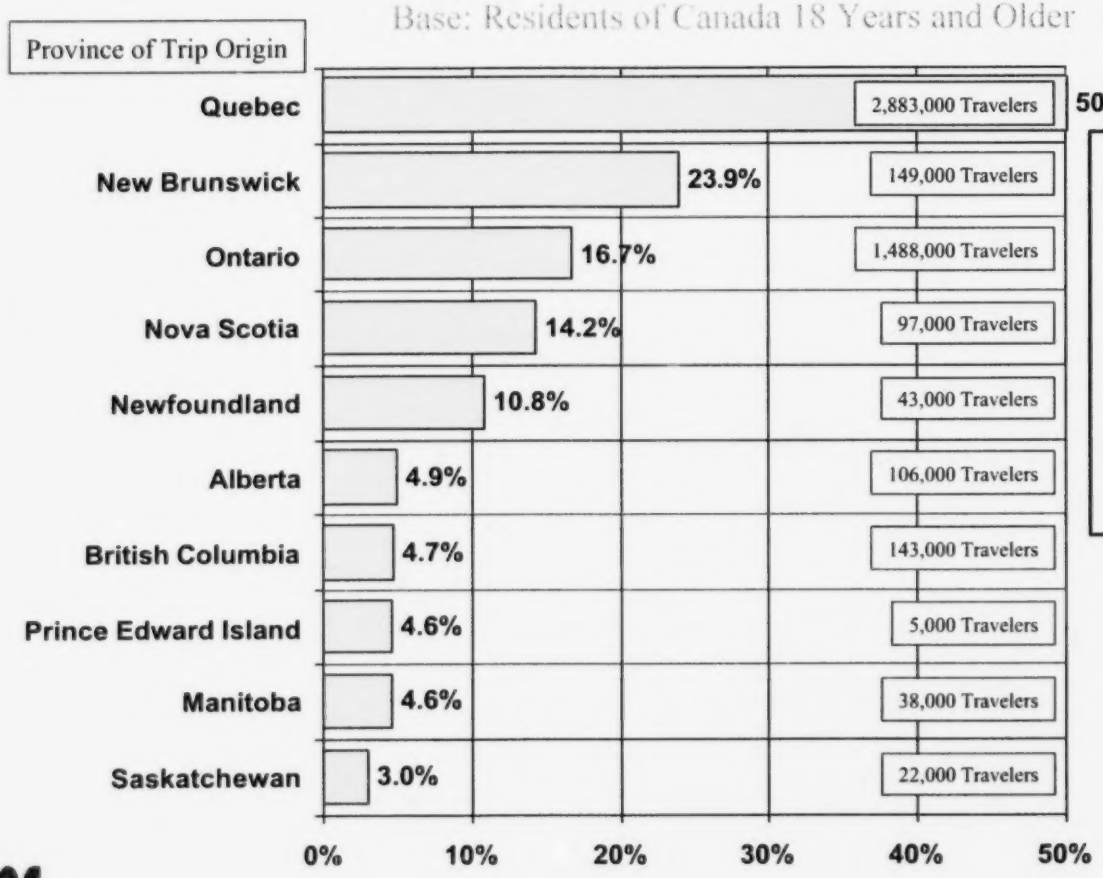
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Quebec

Pleasure Trips to Quebec

Base: Residents of Canada 18 Years and Older

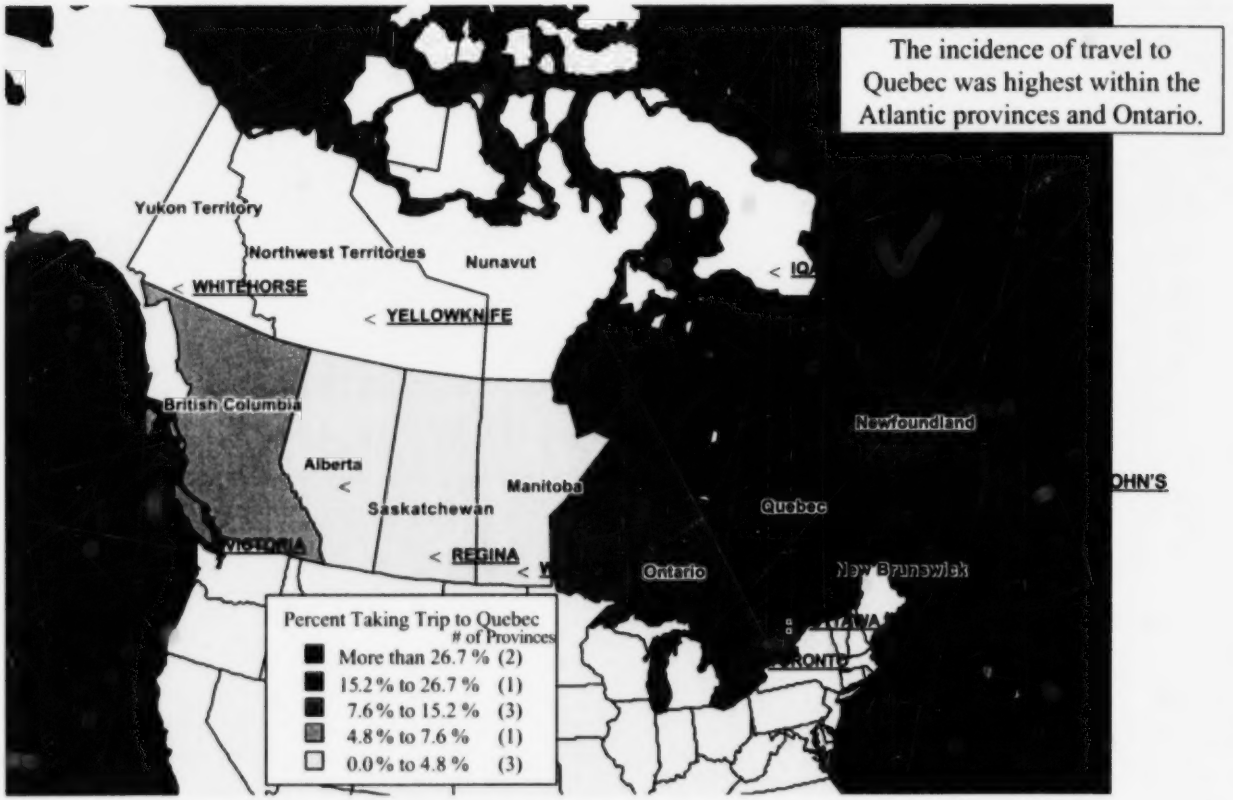


65.9 % of those who took a pleasure trip in Quebec were from Quebec. In terms of other provinces, residents of New Brunswick, Ontario and Nova Scotia were the most likely to have traveled to Quebec in the past two years. The largest number of travelers to Quebec were from Ontario (34.0 %), Nova Scotia (3.4 %) and Alberta (2.4 %).

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Quebec

Pleasure Trips to Quebec

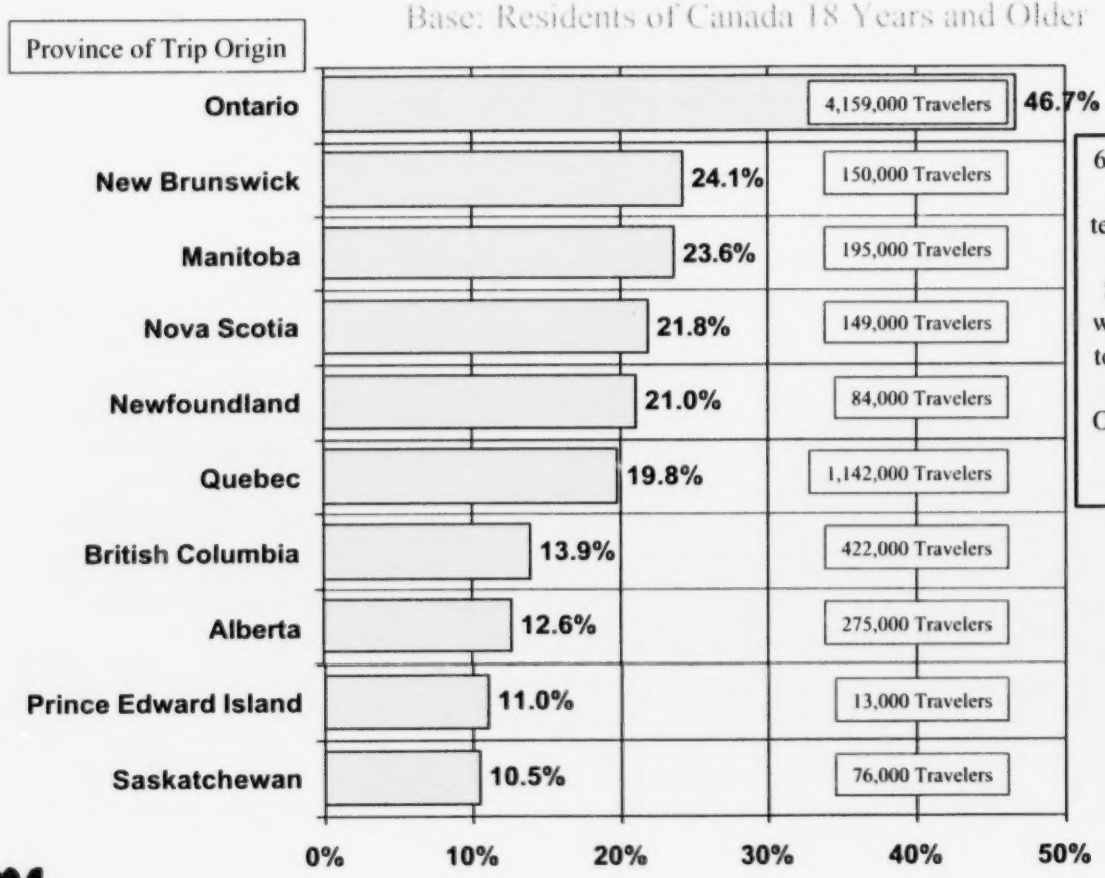
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Ontario

Pleasure Trips to Ontario

Base: Residents of Canada 18 Years and Older

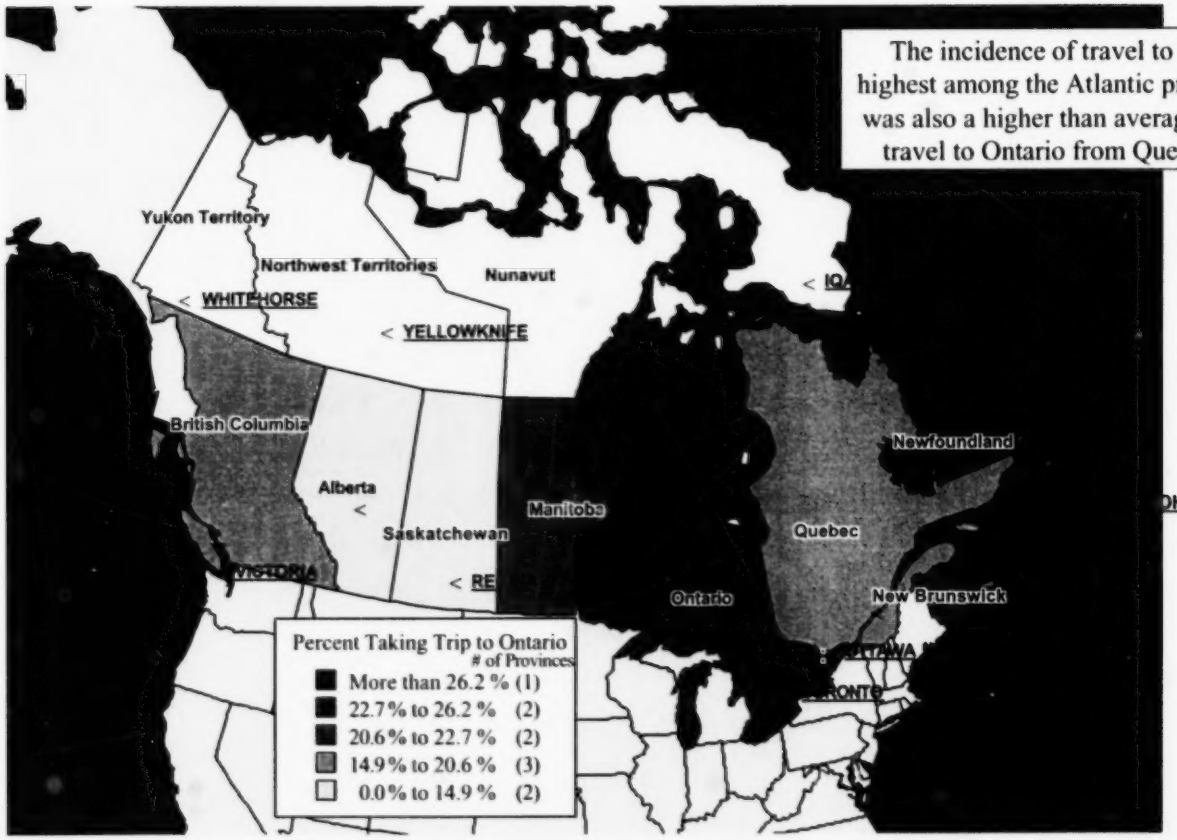


62.3 % of those taking pleasure trips in Ontario were from Ontario. In terms of other provinces, residents of New Brunswick, Manitoba, Nova Scotia, Newfoundland and Quebec were the most likely to have traveled to Ontario in the past two years. The largest number of travelers to Ontario were from Quebec (17.1 %), British Columbia (6.3 %) and Alberta (4.1 %).

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Ontario

Pleasure Trips to Ontario

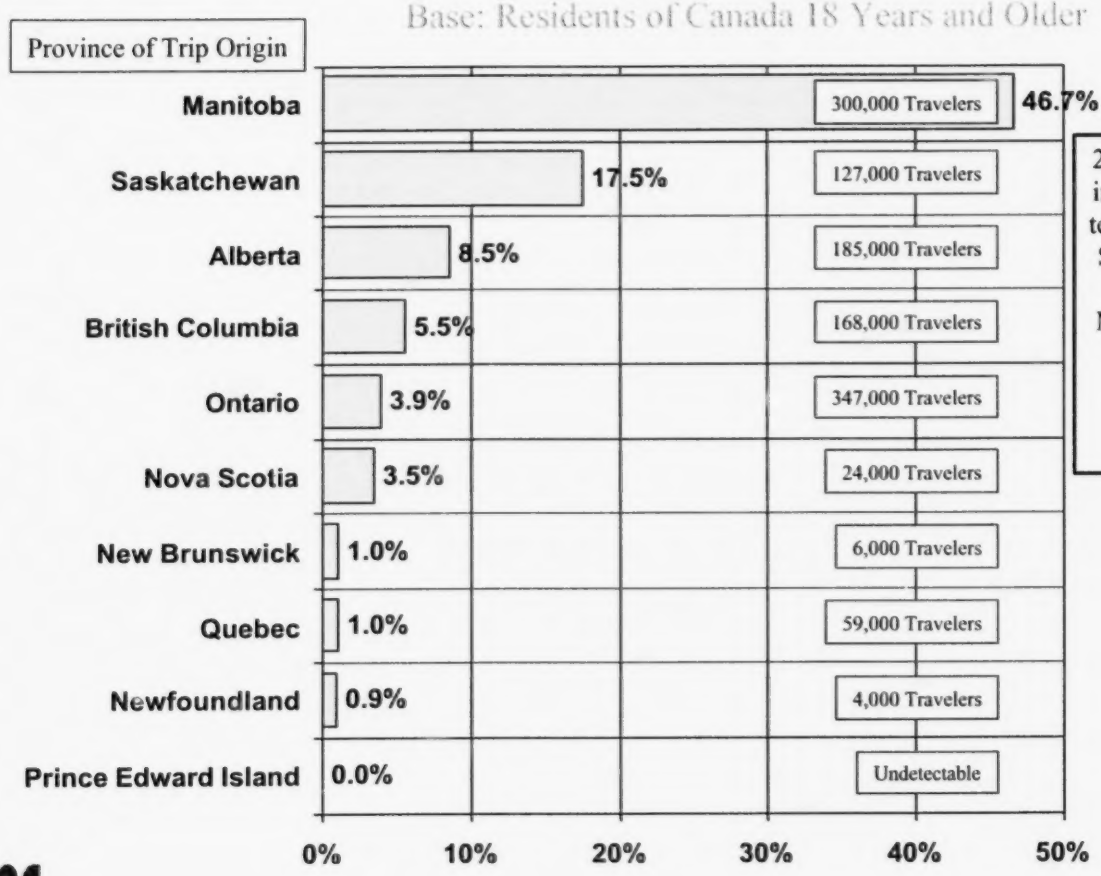
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Manitoba

Pleasure Trips to Manitoba

Base: Residents of Canada 18 Years and Older

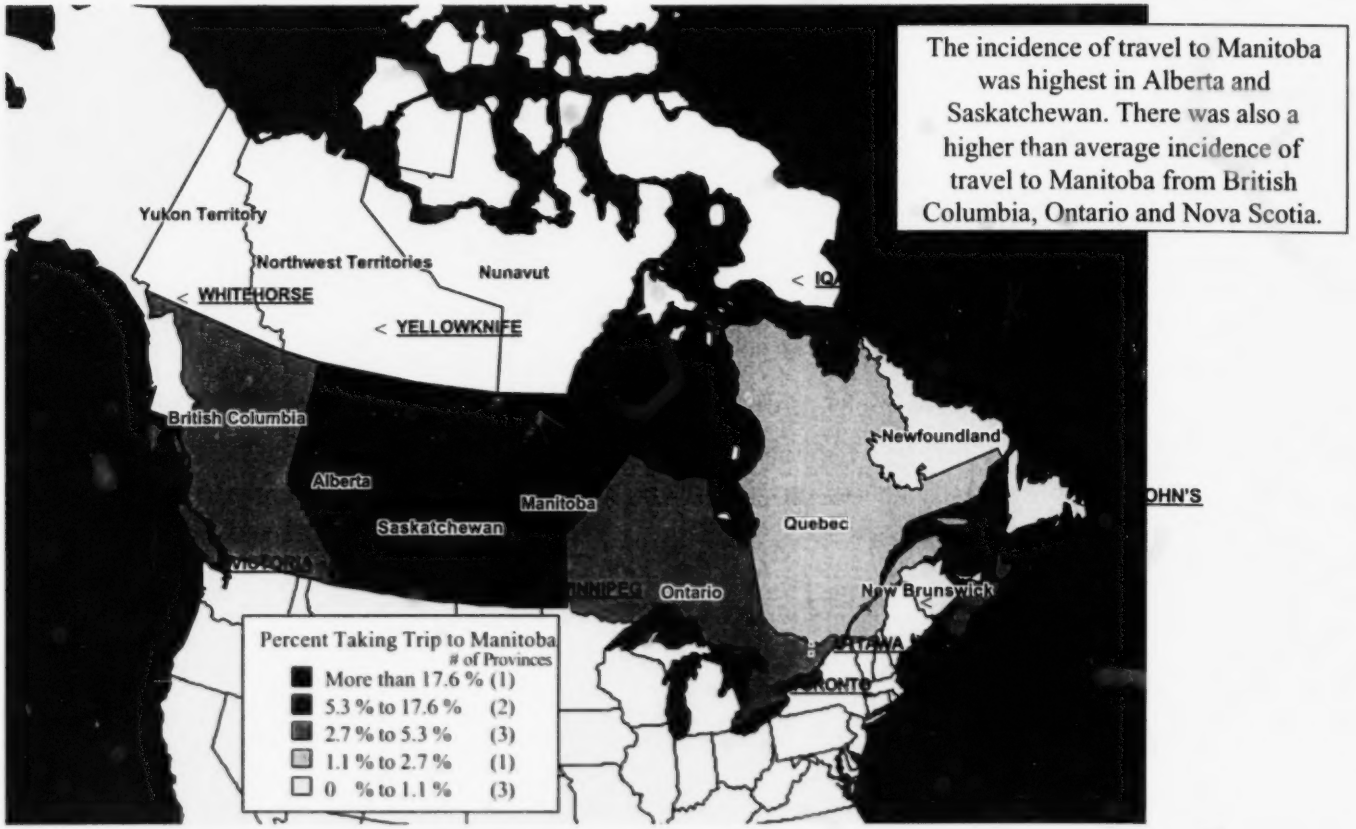


24.6 % of those taking pleasure trips in Manitoba were from Manitoba. In terms of other provinces, residents of Saskatchewan and Alberta were the most likely to have traveled to Manitoba in the past two years. The largest number of travelers to Manitoba were from Ontario (28.4 %), Alberta (15.2 %) and British Columbia (13.7 %).

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Manitoba

Pleasure Trips to Manitoba

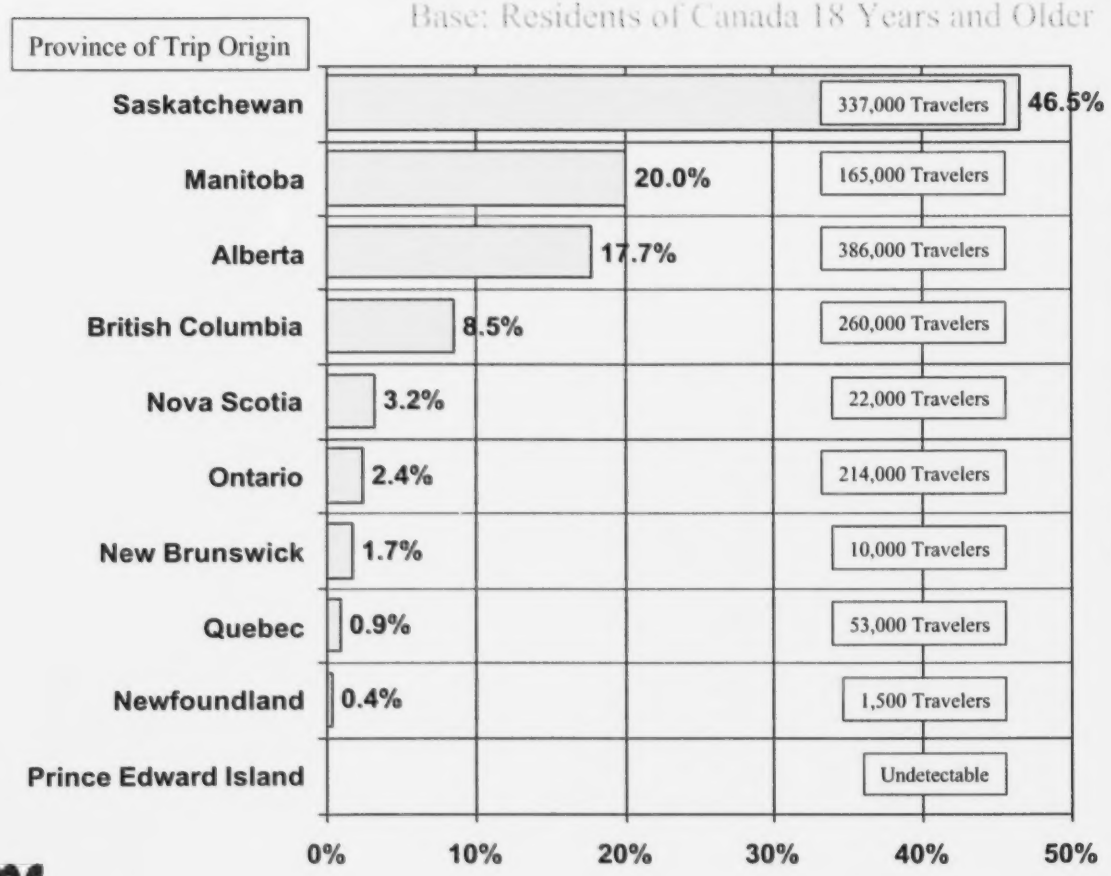
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Saskatchewan

Pleasure Trips to Saskatchewan

Base: Residents of Canada 18 Years and Older

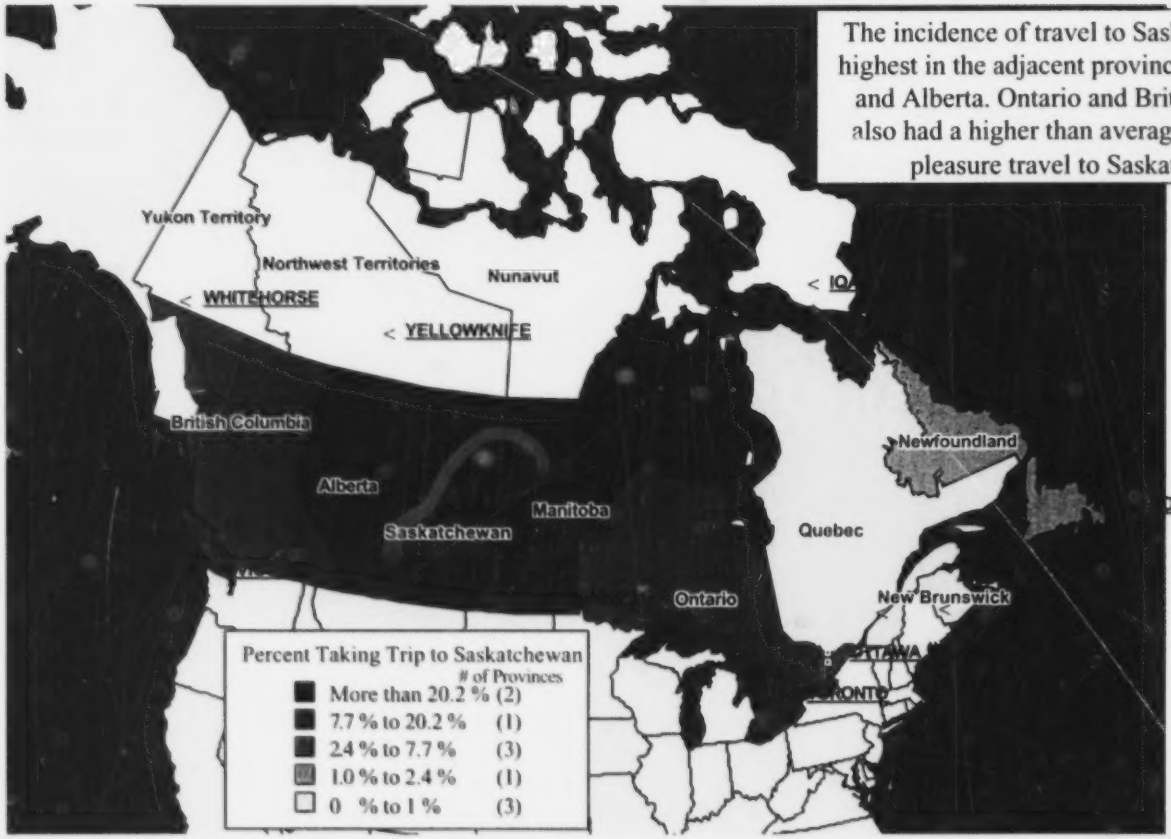


23.3 % of those taking pleasure trips in Saskatchewan were from the province. In terms of other provinces, residents of Manitoba and Alberta were the most likely to have traveled to Saskatchewan during the past two years. The largest number of travelers to Saskatchewan were from Alberta (26.6 %), British Columbia (17.9 %) & Ontario (14.7 %).

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Saskatchewan

Pleasure Trips to Saskatchewan

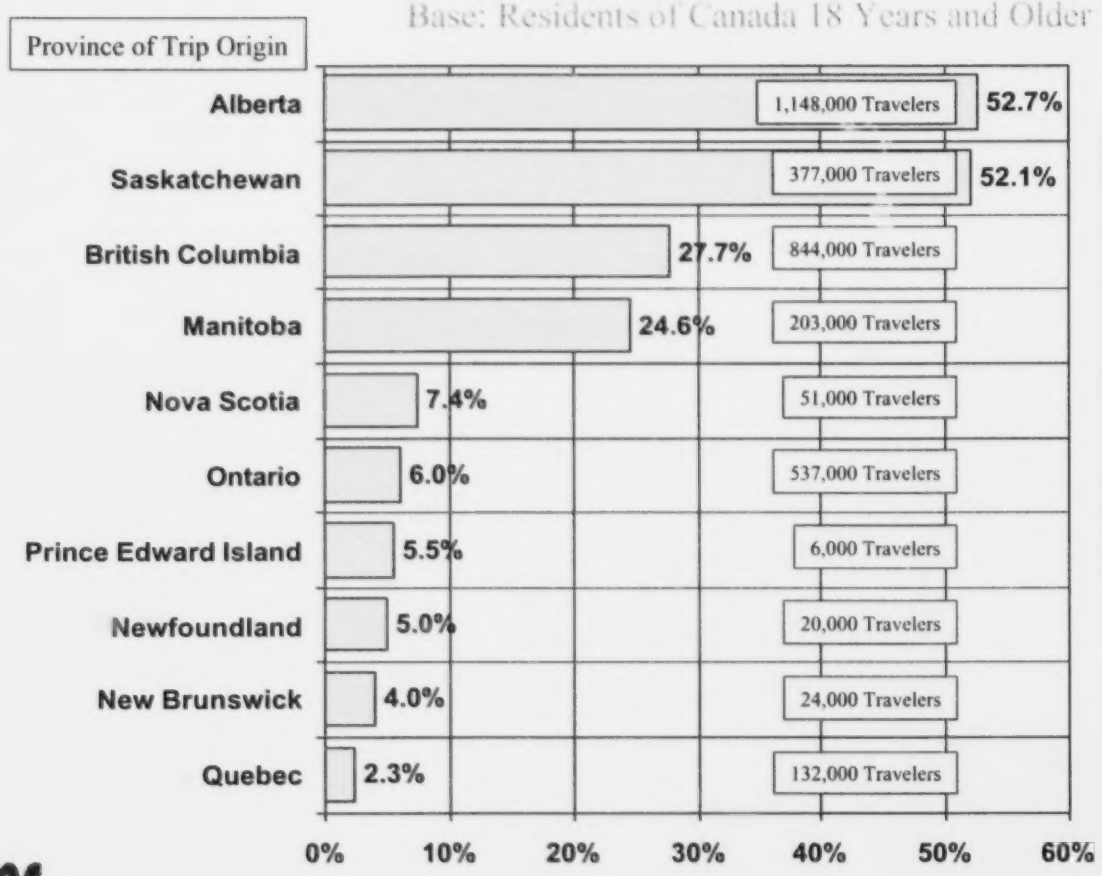
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Alberta

Pleasure Trips to Alberta

Base: Residents of Canada 18 Years and Older

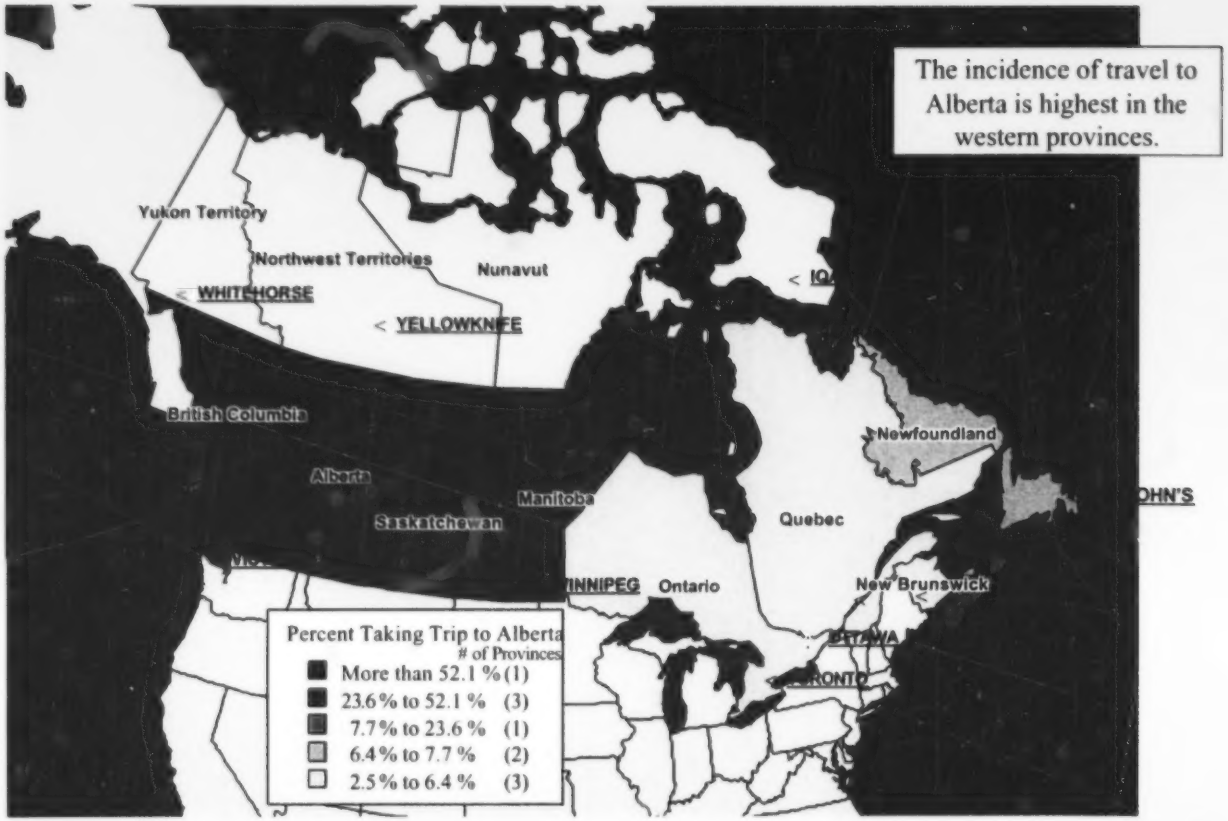


34.3 % of those taking overnight trips in Alberta live in the province. Residents of Saskatchewan were also frequent visitors to Alberta. Those from British Columbia and Manitoba also exhibit a higher than average incidence of pleasure trips to the province. The largest number of travelers to Alberta were from British Columbia (25.2 %), Ontario (16.1 %) and Saskatchewan (11.3 %).

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Alberta

Pleasure Trips to Alberta

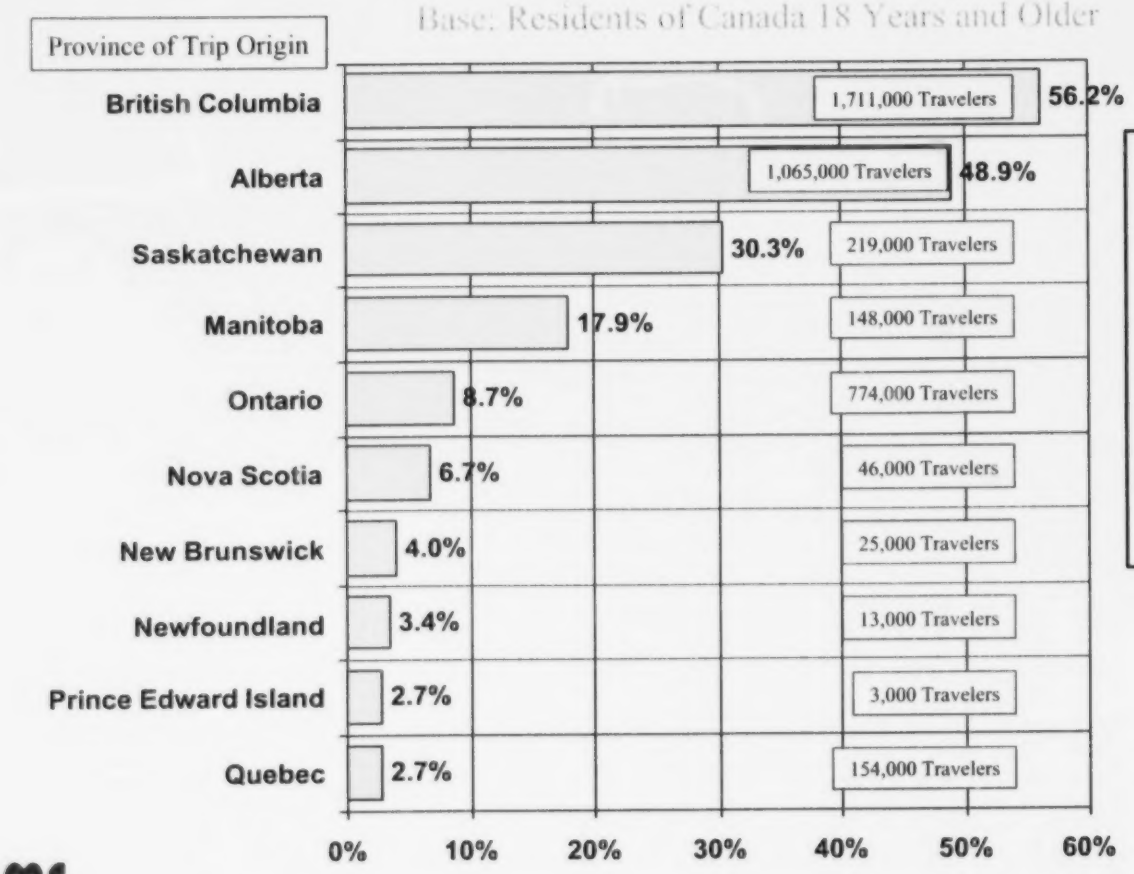
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to British Columbia

Pleasure Trips to British Columbia

Base: Residents of Canada 18 Years and Older

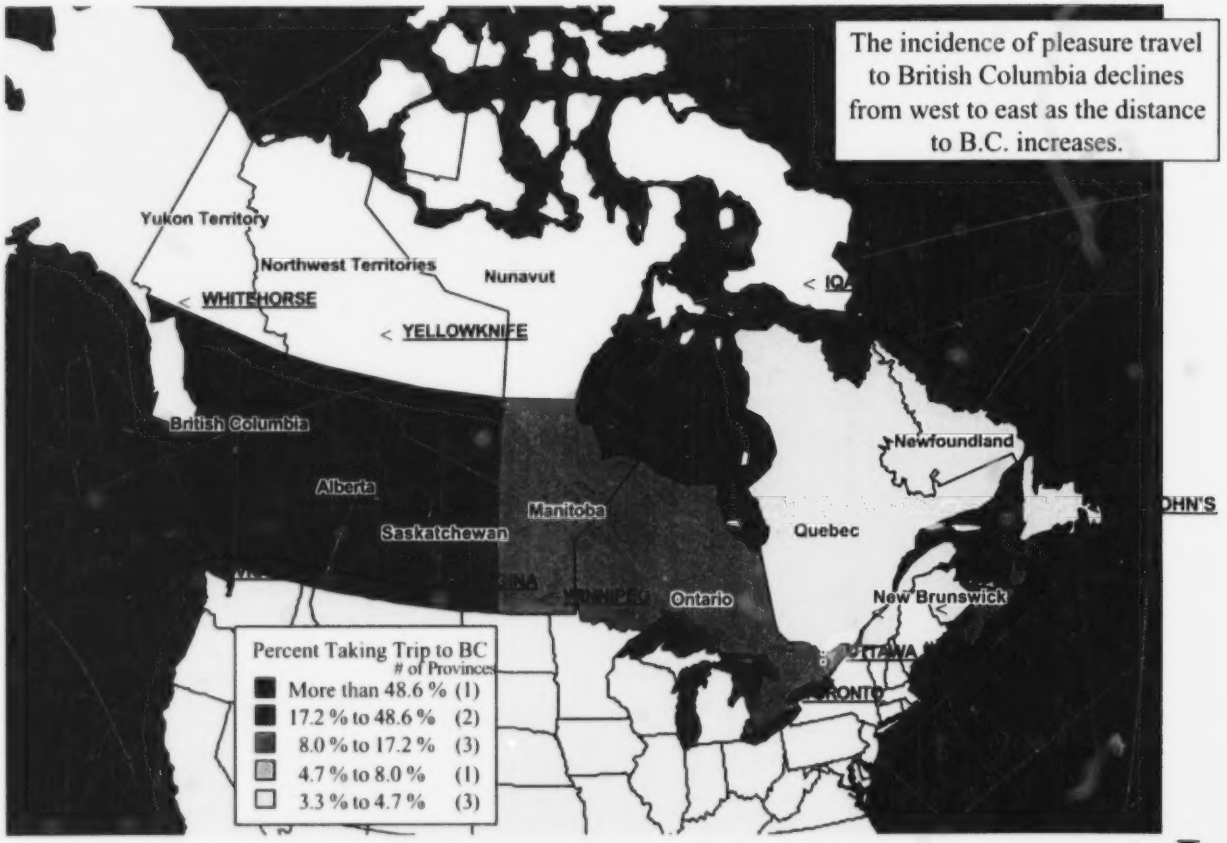


34.3 % of those taking pleasure trips in British Columbia live in the province. Residents of Alberta were also frequent visitors to B.C. Those from Saskatchewan and Manitoba also exhibit a higher than average incidence of pleasure trips to B.C. The largest number of travelers to British Columbia were from Alberta (25.6 %), Ontario (18.6 %) and Saskatchewan (5.2 %).

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to British Columbia

Pleasure Trips to British Columbia

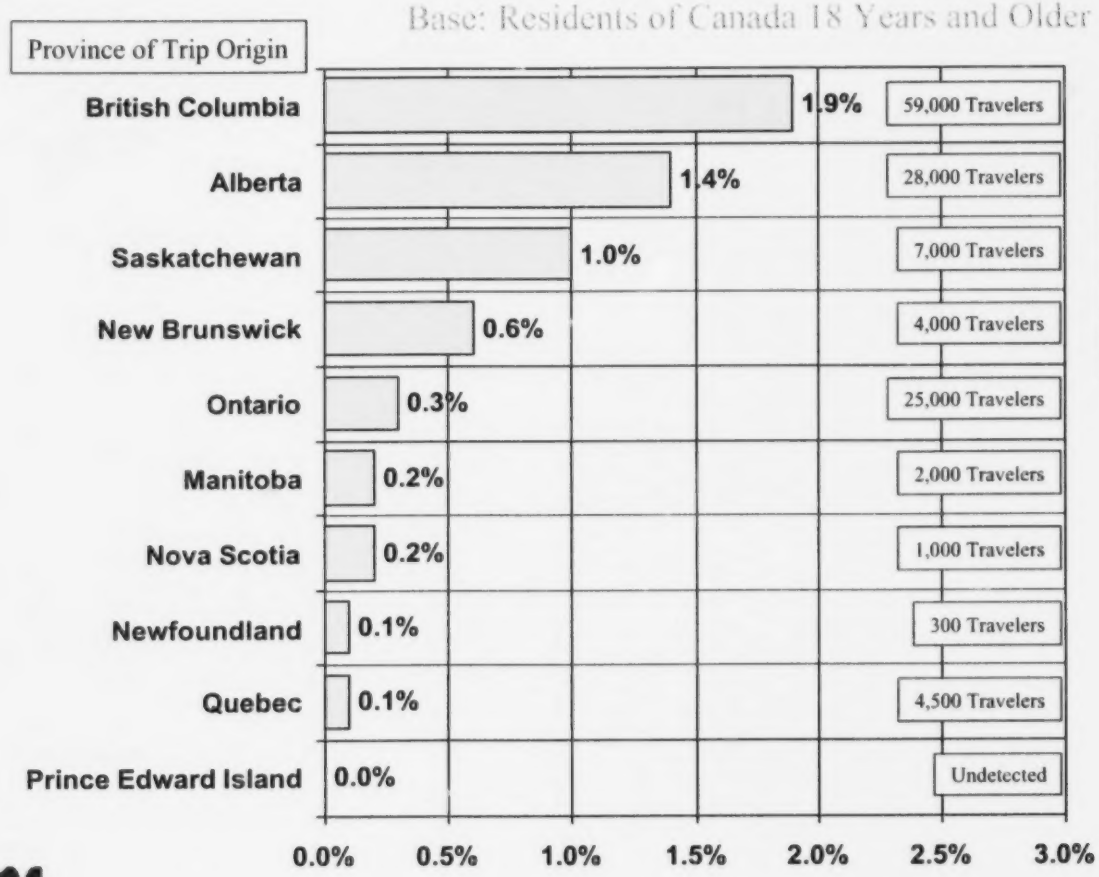
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Yukon

Pleasure Trips to Yukon

Base: Residents of Canada 18 Years and Older

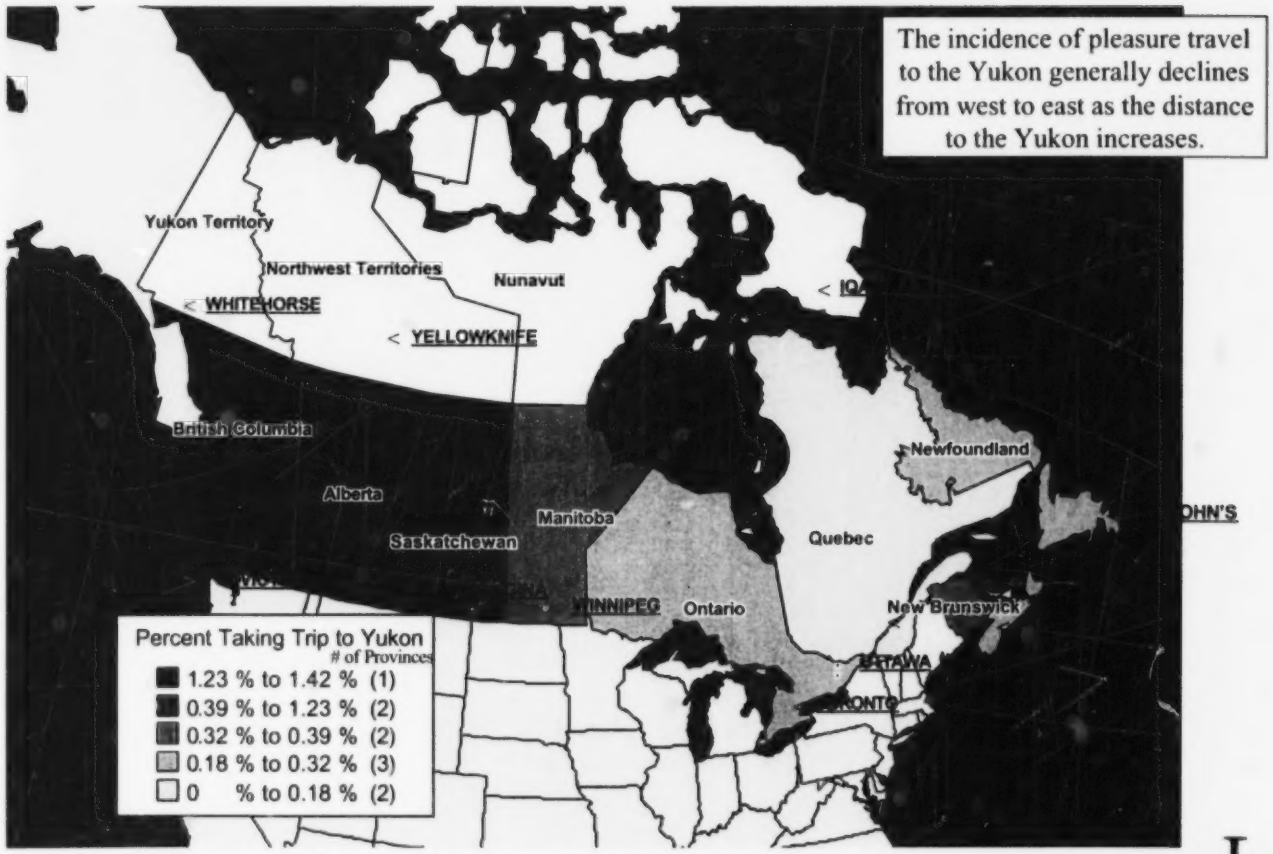


Travelers from British Columbia, Alberta and Saskatchewan were the most frequent visitors to the Yukon. The largest number of travelers to the Yukon were from B.C. (44.7 %), Alberta (21.2 %) and Ontario (18.2 %).

Percent of Population (18 Plus) Taking Overnight, Pleasure Trips to Yukon

Pleasure Trips to Yukon

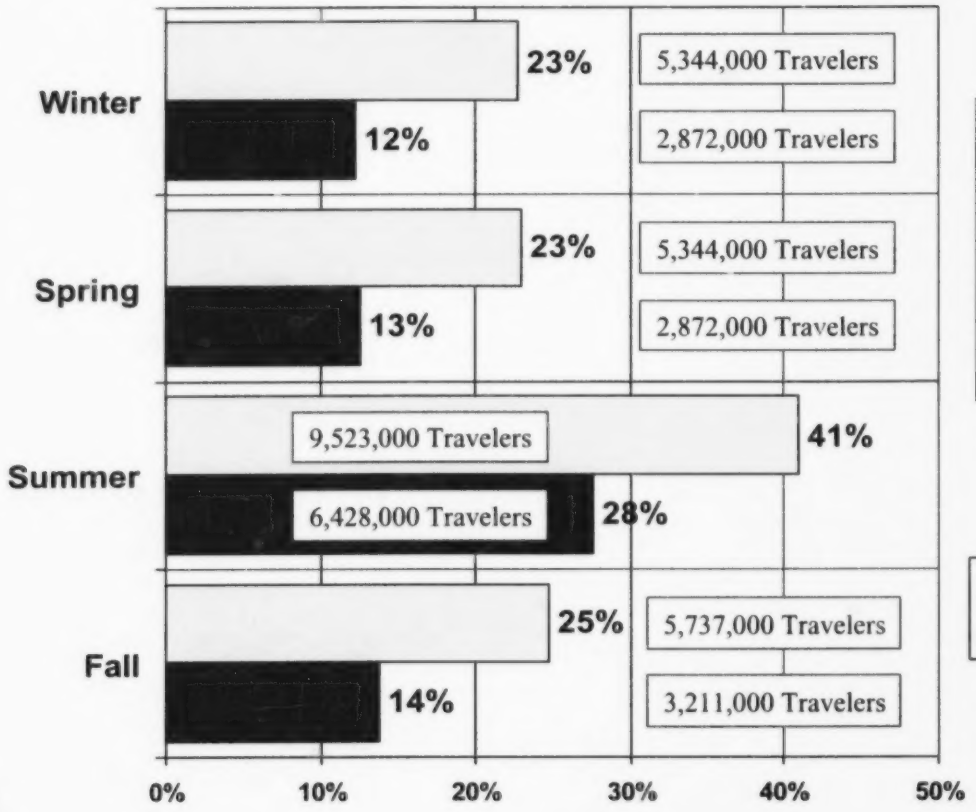
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight, Pleasure Trips in Past two years

By Season

Base: Residents of Canada 18 Years and Older

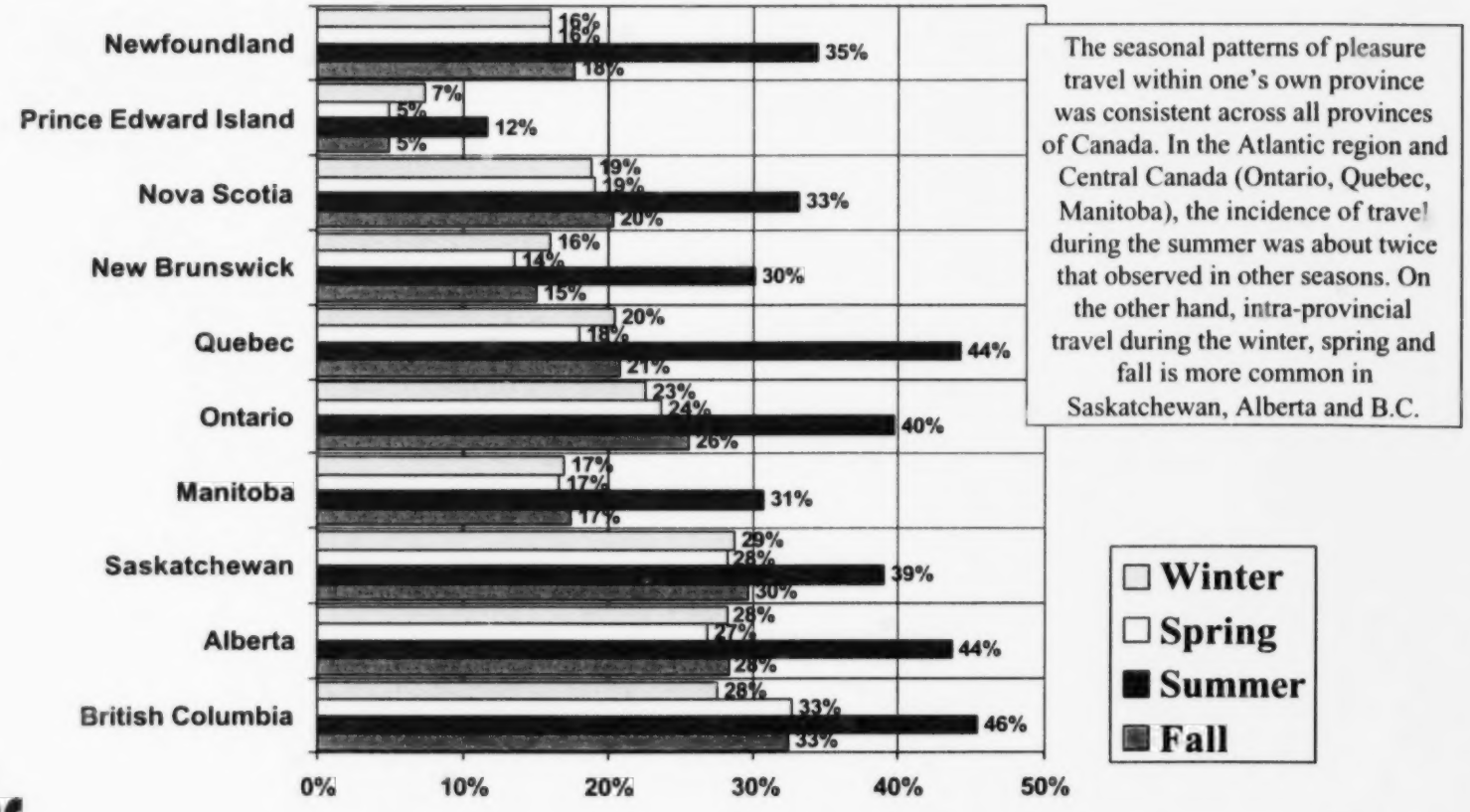


Clearly, domestic pleasure travel was more likely during the summer than during other seasons of the year. There was relatively little variation in the likelihood that trips were taken during the winter, spring or fall. This seasonal pattern is the same for intra-provincial travel and inter-provincial travel.

Percent of Population (18 Plus) Taking Overnight, Intra-Provincial Pleasure Trips in Past two years

Within-Province Travel By Season

Base: Residents of Canada 18 Years and Older



The seasonal patterns of pleasure travel within one's own province was consistent across all provinces of Canada. In the Atlantic region and Central Canada (Ontario, Quebec, Manitoba), the incidence of travel during the summer was about twice that observed in other seasons. On the other hand, intra-provincial travel during the winter, spring and fall is more common in Saskatchewan, Alberta and B.C.

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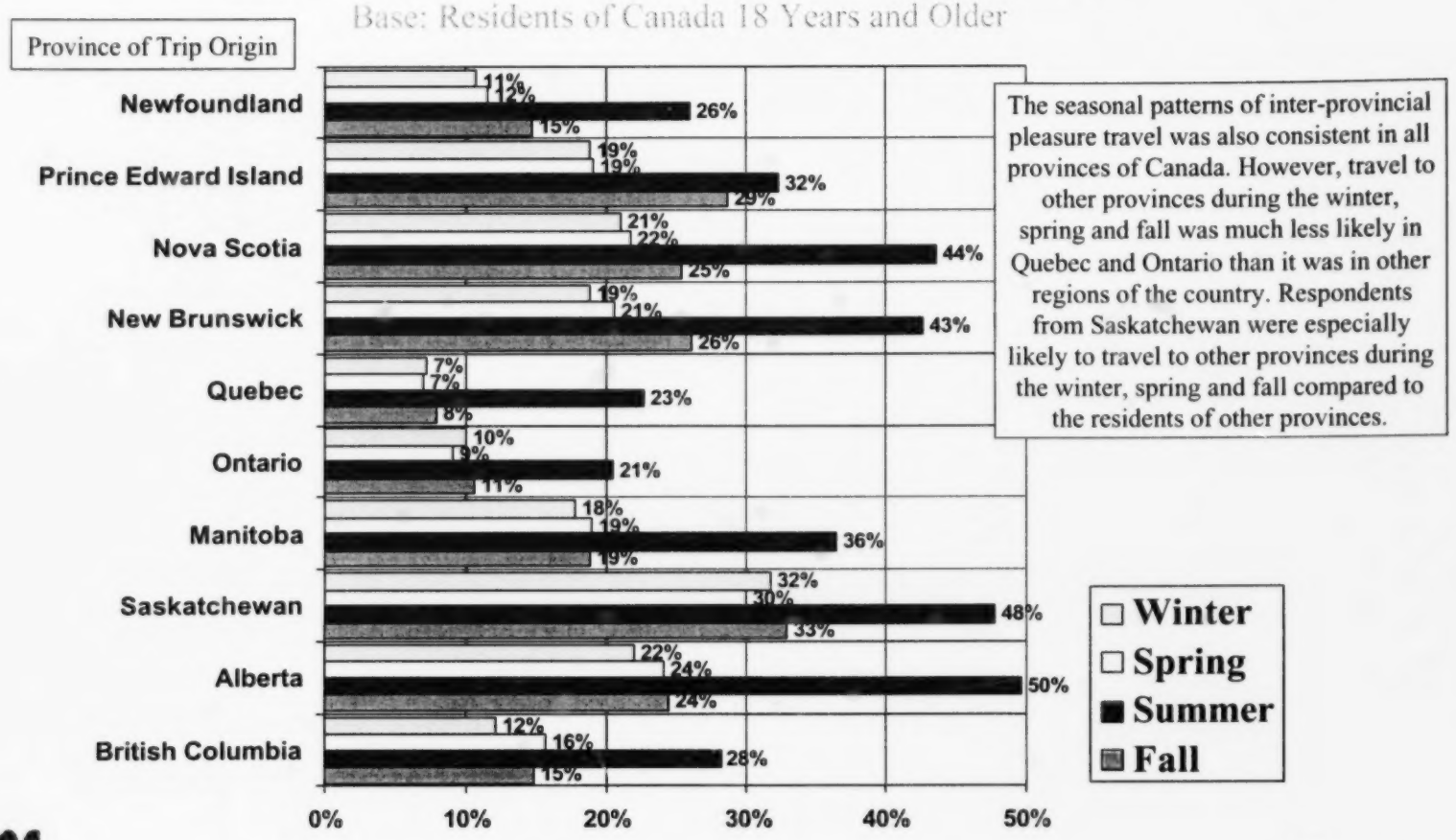
Percent of Population (18 Plus) Taking Overnight, Inter-Provincial Pleasure Trips in Past two years

Travel to Other Provinces By Season

Base: Residents of Canada 18 Years and Older

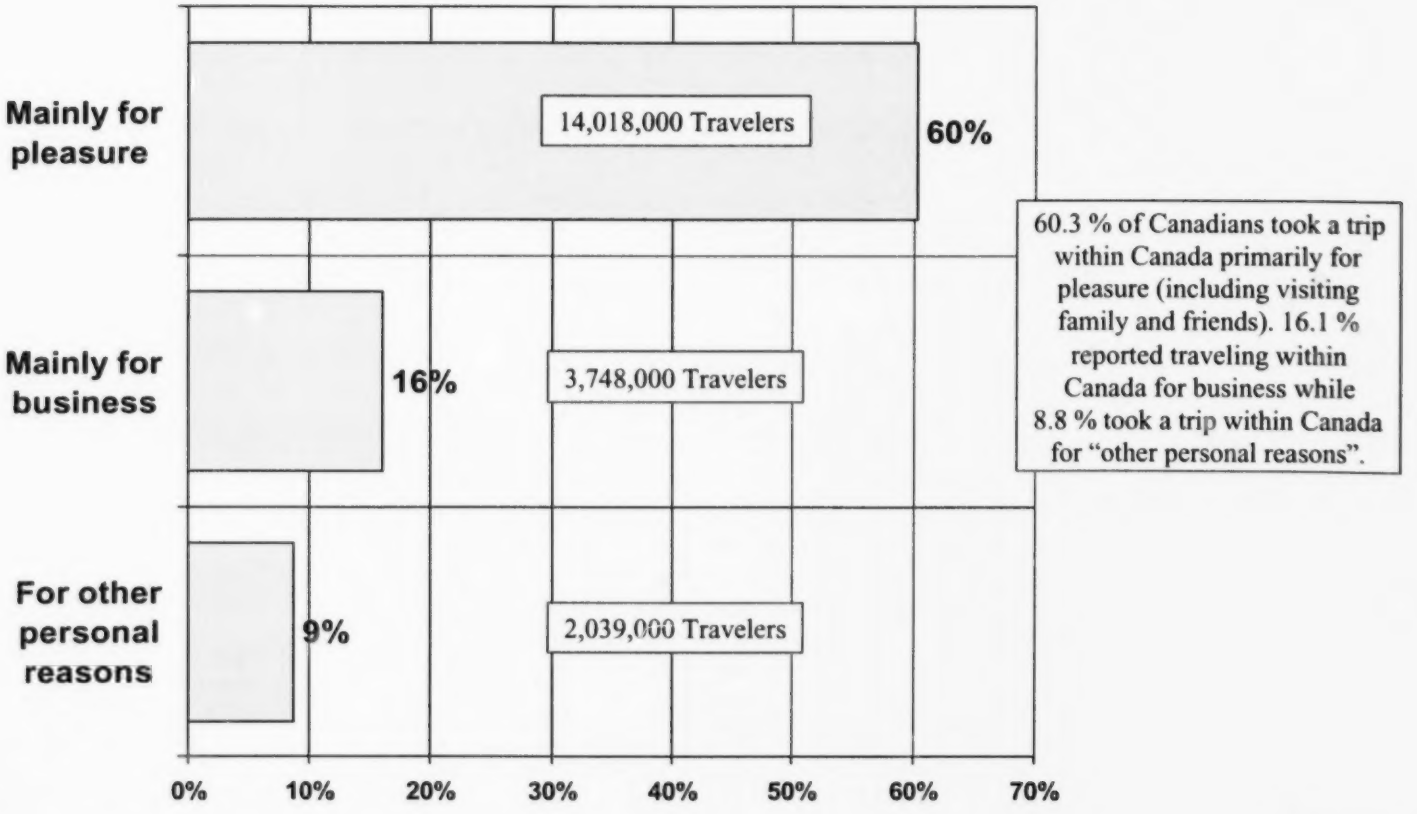


The seasonal patterns of inter-provincial pleasure travel was also consistent in all provinces of Canada. However, travel to other provinces during the winter, spring and fall was much less likely in Quebec and Ontario than it was in other regions of the country. Respondents from Saskatchewan were especially likely to travel to other provinces during the winter, spring and fall compared to the residents of other provinces.

Percent of Population (18 Plus) Taking Overnight Trips for Various Reasons

By Reasons for Travel

Base: Residents of Canada 18 Years and Older

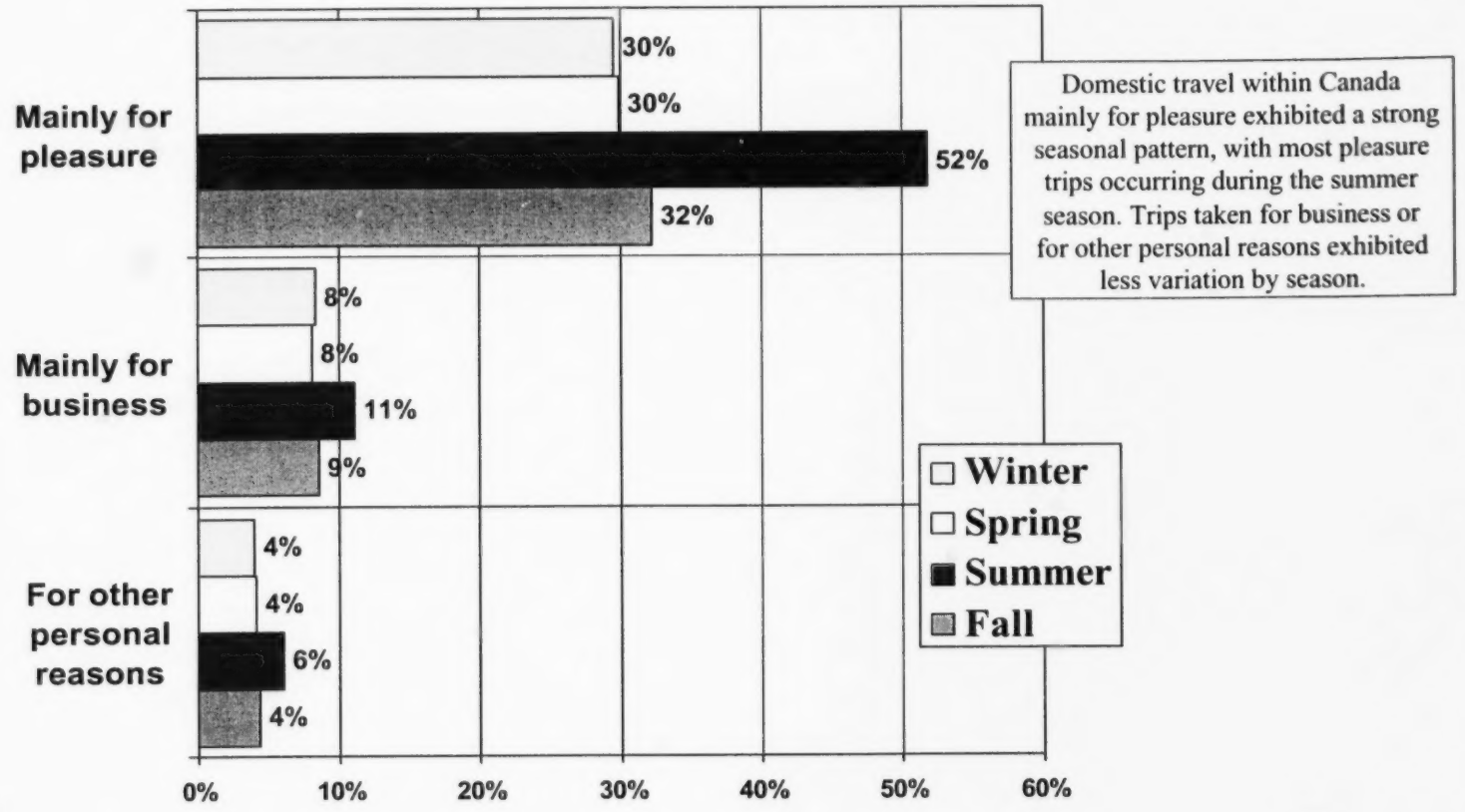


60.3 % of Canadians took a trip within Canada primarily for pleasure (including visiting family and friends). 16.1 % reported traveling within Canada for business while 8.8 % took a trip within Canada for "other personal reasons".

Percent of Population (18 Plus) Taking Overnight Trips for Various Reasons

By Reasons for Travel and By Travel Season

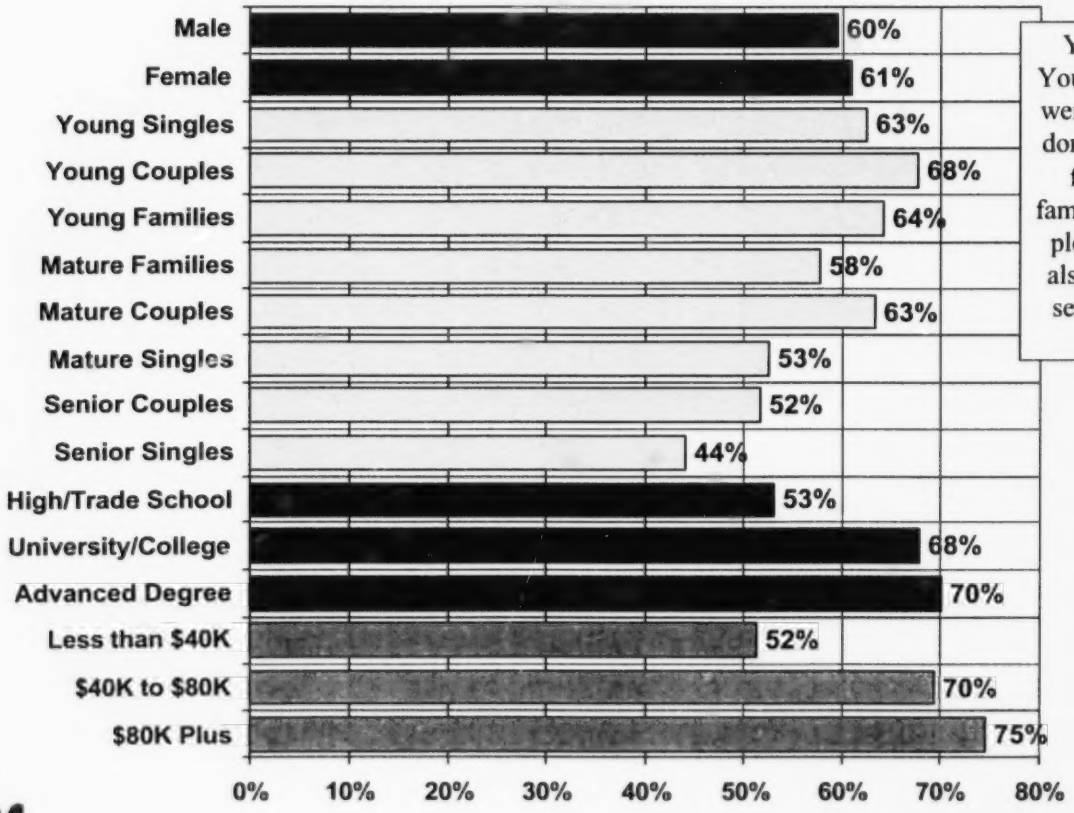
Base: Residents of Canada 18 Years and Older



Percent of Population (18 Plus) Taking Overnight Trips Mainly for Pleasure

Trips Taken Mainly for Pleasure

Base: Residents of Canada 18 Years and Older

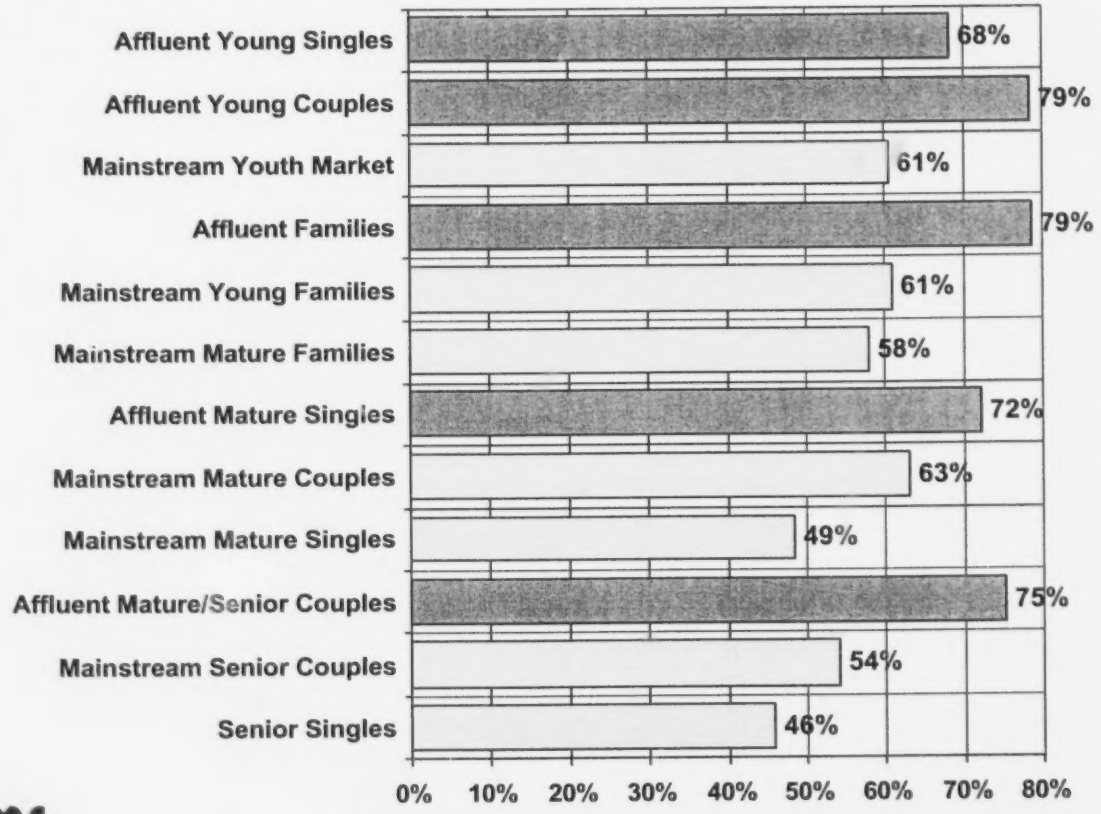


Young Singles, Young Couples, Young Families and Mature Couples were the most likely to have taken a domestic trip within Canada mainly for pleasure (including visiting family and friends). The incidence of pleasure travel within Canada was also higher among those with post-secondary education or household incomes above $40,000.

Percent of Population (18 Plus) Taking Overnight Trips Mainly for Pleasure

Trips Taken Mainly for Pleasure

Base: Residents of Canada 18 Years and Older

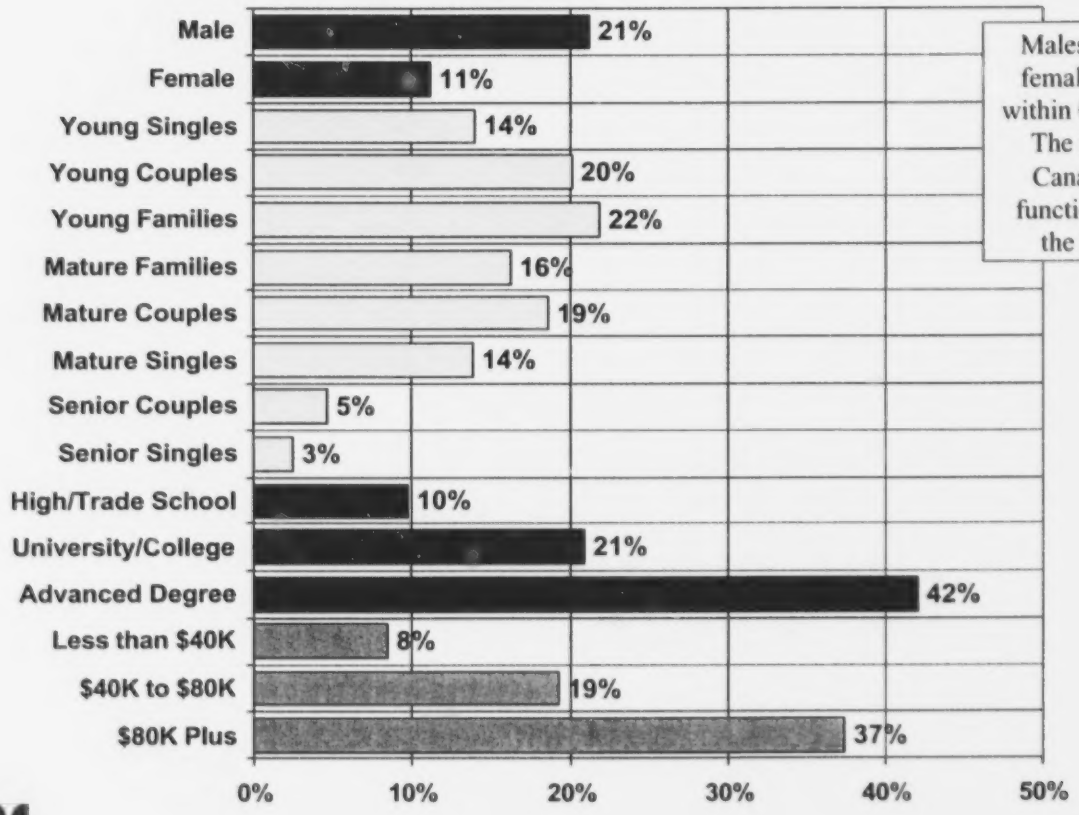


The affluent segments were slightly more likely to have taken a pleasure trip within Canada during the past two years than the Mainstream segments. However, the difference between the mainstream and the affluent segments was comparatively small compared to the differences observed for travel to Canada from the United States (see Page 91).

Percent of Population (18 Plus) Taking Overnight Trips Mainly for Business

Trips Taken Mainly for Business

Base: Residents of Canada 18 Years and Older

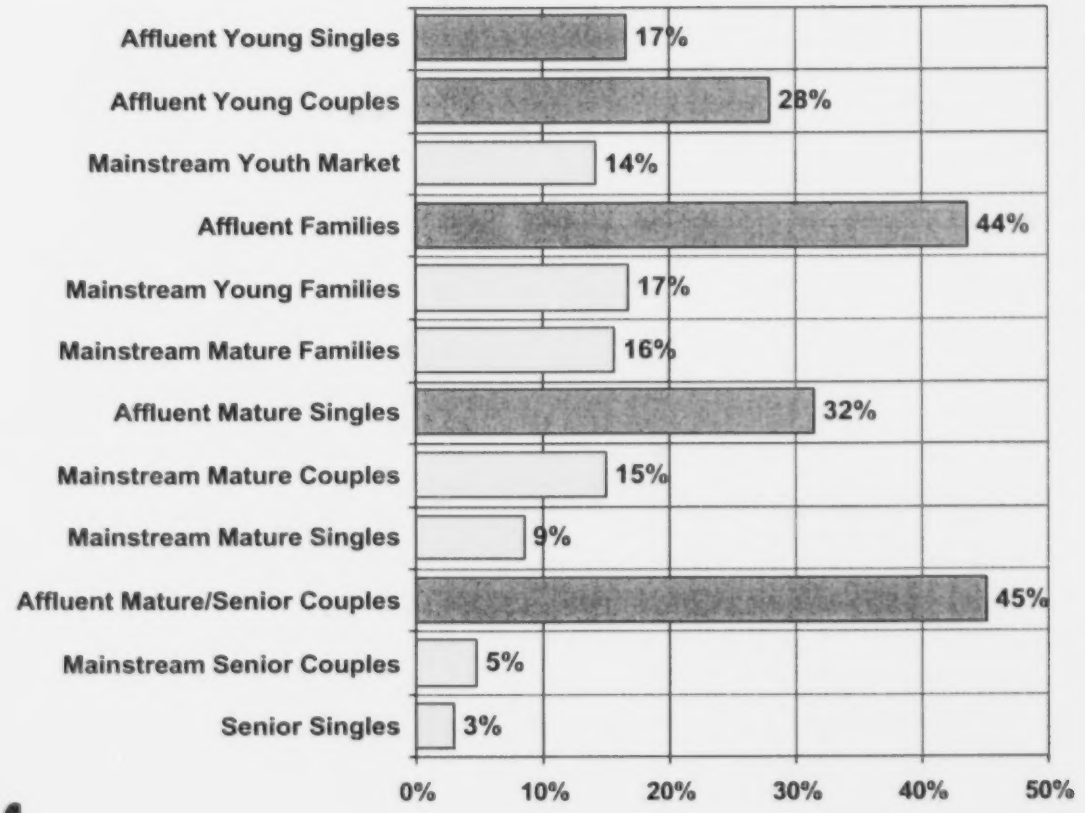


Males were almost twice as likely as females to have taken a business trip within Canada during the last two years. The incidence of business travel to Canada also increased sharply as a function of the household income and the respondent's education level.

Percent of Population (18 Plus) Taking Overnight Trips Mainly for Business

Trips Taken Mainly for Business

Base: Residents of Canada 18 Years and Older

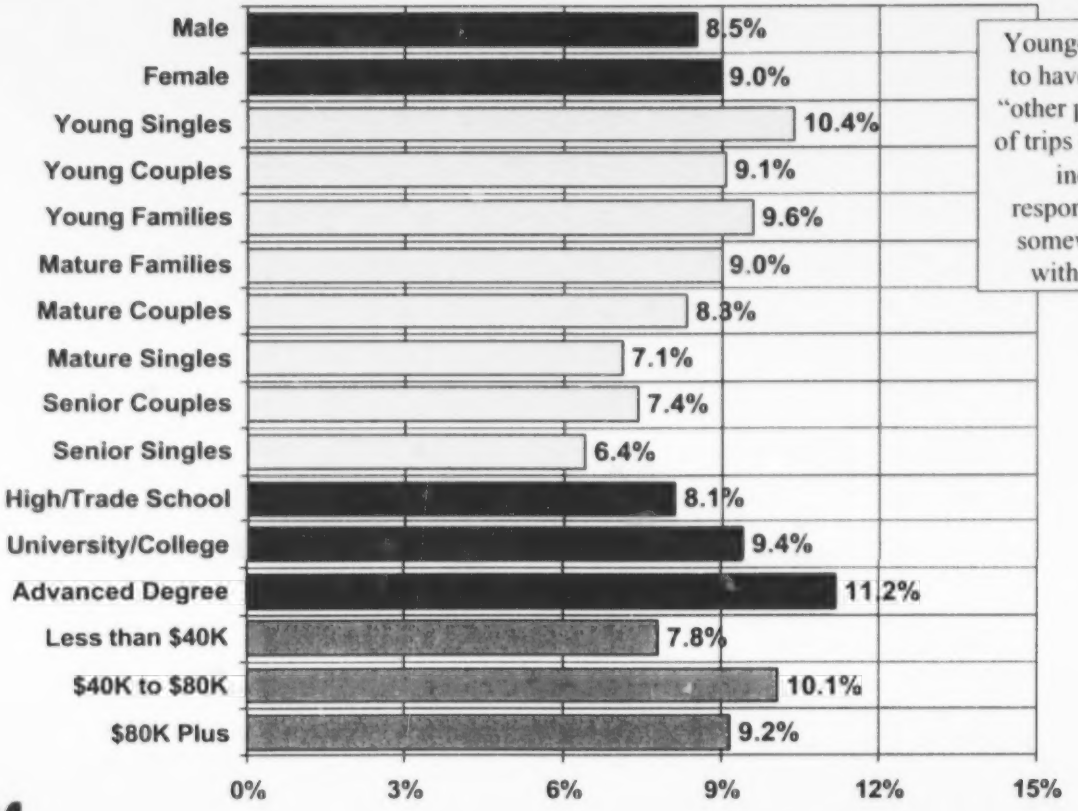


The affluent segments were much more likely to have taken a business trip to Canada during the past two years. Business travel was especially likely among the Affluent Families and Affluent Mature and Senior Couples segments.

Percent of Population (18 Plus) Taking Overnight Trips Mainly for Other Personal Reasons

Trips Taken For "Other Personal Reasons"

Base: Residents of Canada 18 Years and Older

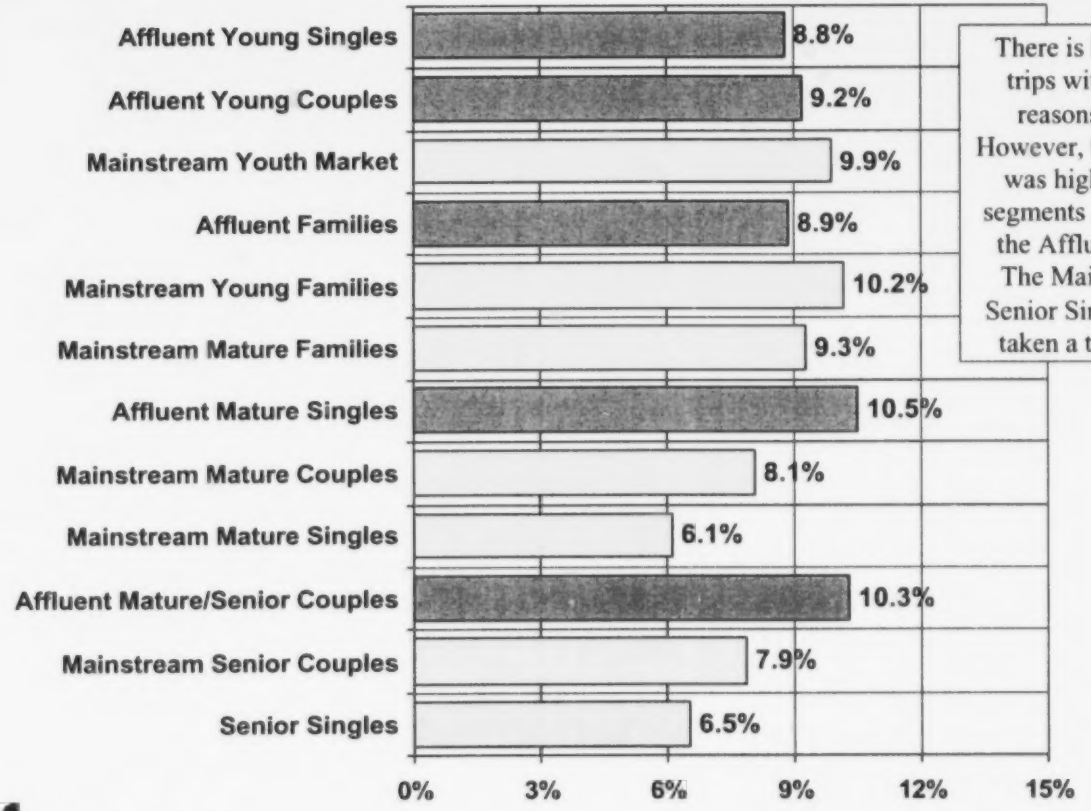


Younger respondents were more likely to have taken a trip within Canada for "other personal reasons". The incidence of trips for "other personal reasons" also increased as a function of the respondent's education level and was somewhat higher among households with incomes of $40,000 or more.

Percent of Population (18 Plus) Taking Overnight Trips Mainly for Other Personal Reasons

Trips Taken For Other Personal Reasons

Base: Residents of Canada 18 Years and Older



There is less variation in the incidence of trips within Canada for "other personal reasons" across the market segments. However, the incidence of this type of travel was higher among the youth and family segments as well as the Mature Singles and the Affluent Mature and Senior Couples. The Mainstream Mature Singles and the Senior Singles were the least likely to have taken a trip for "other personal reasons".

Section Five

Intentions to Take Overnight Pleasure Trips in Canada During the Next Two Years

Intentions to Take Overnight Pleasure Trips in Canada During the Next Two Years

- Key Findings -

65.4 % of the residents of Canada and 29.2 % of the residents of the United States expect to take a pleasure trip to Canada during the next two years. The percent of Canada's residents with travel plans is comparable to the actual number who took a domestic vacation during the past two years (65.4 % with intentions versus 59.8 % who took trips). However, U.S. residents were 222 % more likely to express intentions to travel to Canada than to have taken a trip to Canada in the last two years (29.2 % with intentions versus 13.1 % who took trips).(Note: Both Canadian and U.S. respondents were more likely to express intentions to travel to other countries than to have traveled to these countries in the last two years. For example, 36.4 % of U.S. respondents had plans to travel to countries other than Canada while only 21.5 % had actually taken such a trip.)

Among residents of Canada, the affluent segments, and especially the Affluent Mature/Senior Couples and Affluent Families, were more likely to express intentions to travel within Canada over the next two years than were the mainstream segments. Affluent Young Couples and Affluent Mature Singles were also more likely to expect to take a Canadian pleasure trip over the next two years. The prime destinations for future travel by Canadians were Ontario, Quebec, Alberta and B.C. However, the Atlantic provinces show the greatest increase in travel intentions relative to actual pleasure travel activity to those provinces during the past two years.

Among residents of the United States, the Affluent Mature/Senior Couples were most likely to express intentions to take an overnight trip to Canada during the next two years. However, the Affluent Young Couples, the Affluent Families and the Affluent Mature Singles were also more likely to take an overnight pleasure trip to Canada than other segments. The most likely destinations for future travel to Canada from the U.S. are Ontario, Quebec and B.C. However, the increase in travel intentions relative to past pleasure travel is greatest for the Maritime provinces and Alberta.

Intentions to Take Overnight Pleasure Trips in Canada During the Next Two Years

- Research Method -

In the telephone survey, respondents were asked whether they were very likely, fairly likely or not likely to take a trip of one or more nights away from home for any purpose in the next two years.

Those with travel intentions were asked whether they were likely to take a pleasure trip to Canada, the United States or to other countries.

If the respondents expressed intentions to take a pleasure trip in Canada, they were asked which province or provinces they were likely to visit and what season of the year they were likely to take this trip.

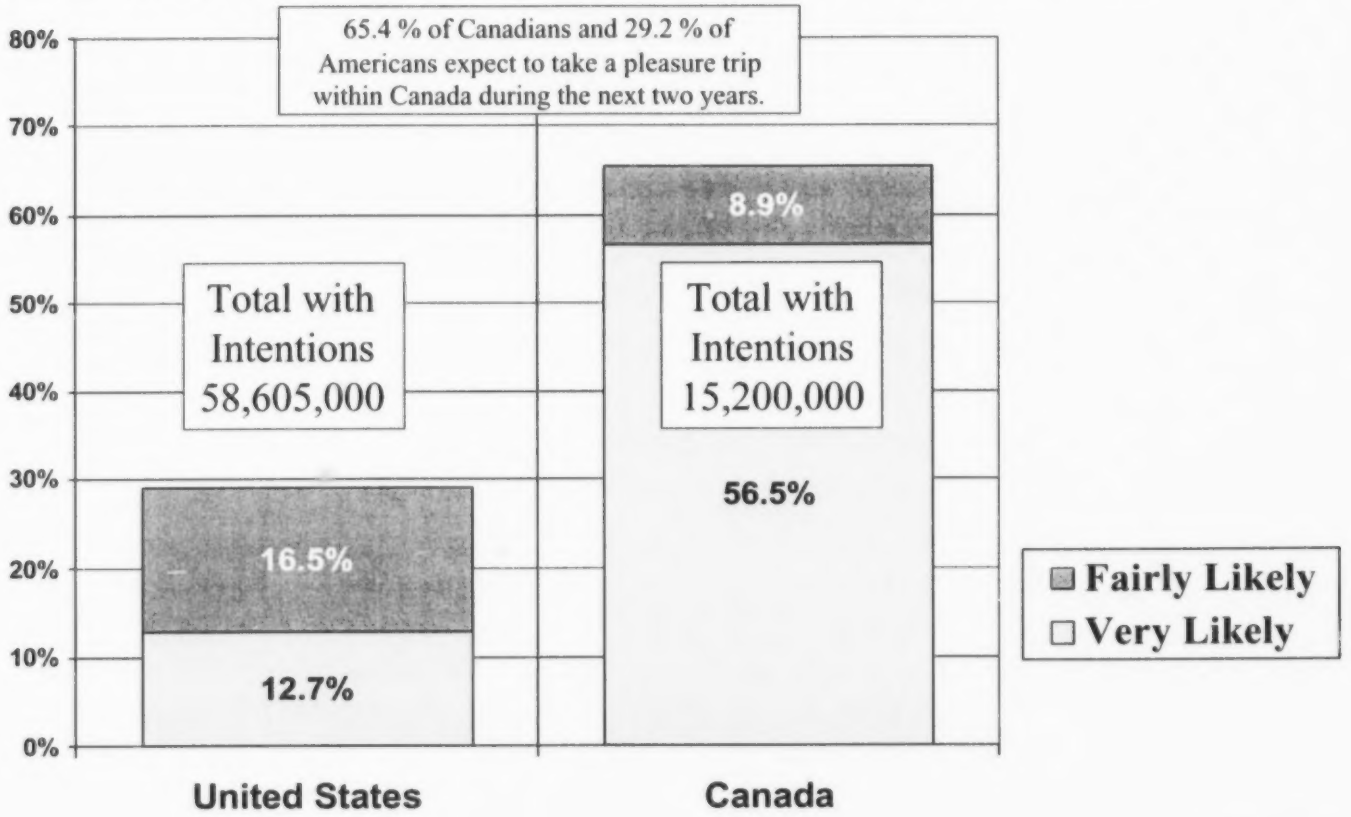
Those who did not express intentions to take a pleasure trip to Canada were asked the reasons for not taking such a trip.

If respondents did not express intentions to take a pleasure trip to Ontario, they were asked the reasons for not taking such a trip.

Percent of Total Population With Intentions to Take Pleasure Trips in Next Two Years

Percent "Very" or "Fairly" Likely to Travel to Canada

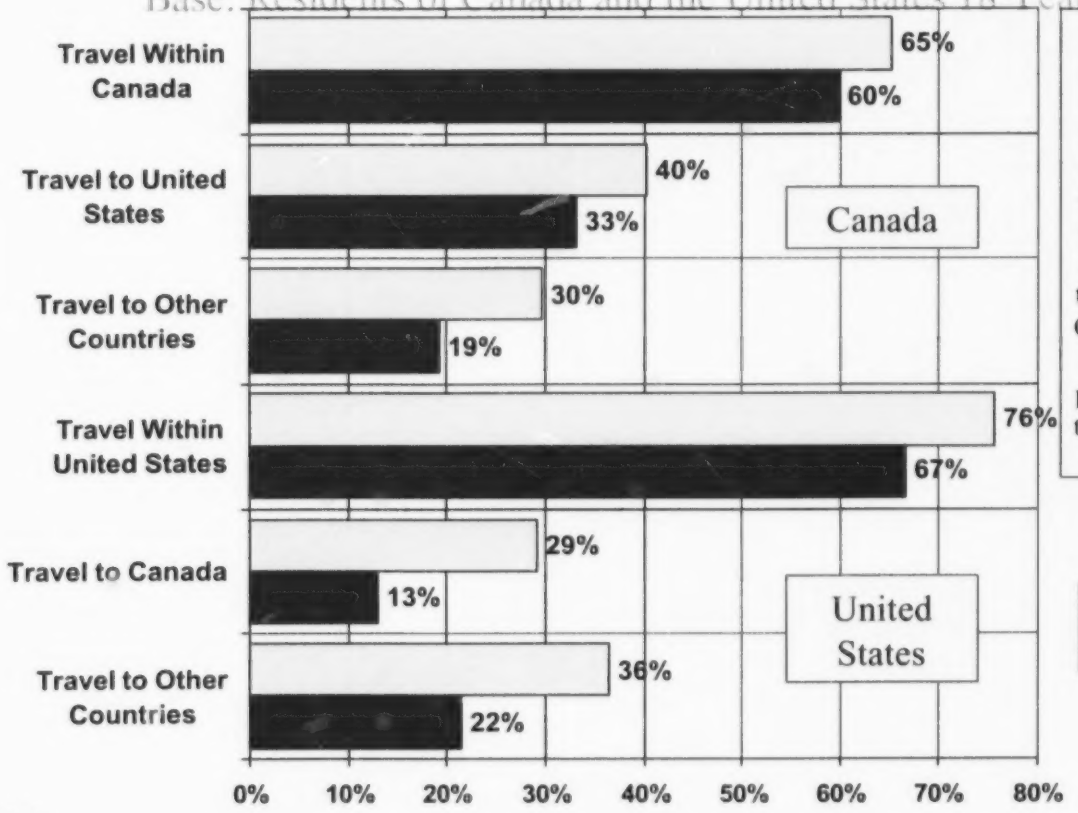
Base: Residents of Canada and the United States 18 Years and Older



Percent of Total Populations With Intentions (Next two years) vs. Actual Travel Behaviour

Pleasure Travel Intentions vs. Past Pleasure Travel

Base: Residents of Canada and the United States 18 Years and Older

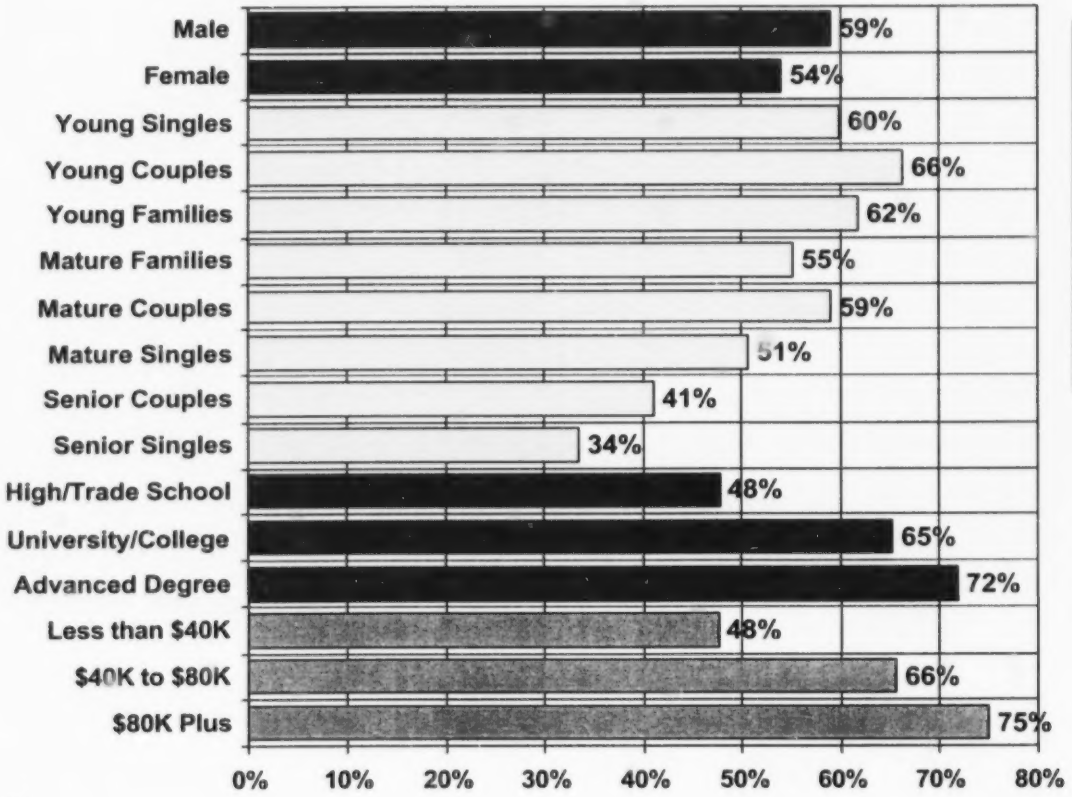


Respondents were more likely to be "very" or "fairly" likely to travel to various destinations than to actually have traveled to these destinations in the last two years. This difference is especially apparent for travel to other countries. However, Americans were 222 % more likely to take a pleasure trip to Canada than to have traveled to Canada and only 169 % more likely to travel to other countries relative to past pleasure travel. This suggests that travel to Canada from the U.S. may be increasing relative to other countries.

Percent of Canadian Population (18 Plus) With Intentions to Take Trip in Next two years

Percent Likely to Take Pleasure Trip in Canada

Base: Residents of Canada 18 Years and Older

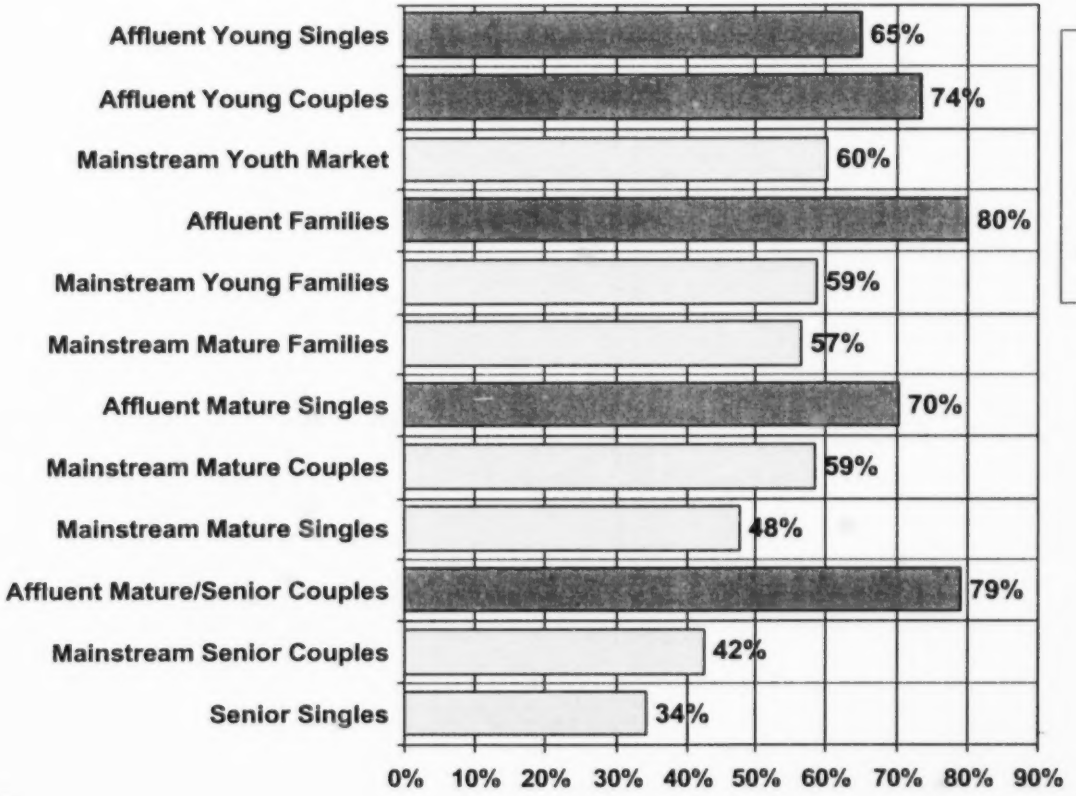


Younger Canadians were very likely to take a pleasure trip within Canada during the next two years. Intentions to travel to Canada generally declined as a function of the age of the respondent. On the other hand, domestic travel intentions tend to increase as a function of the respondent's education level and household income.

Percent of Canadian Population (18 Plus) With Intentions to Take Trip in Next two years

Percent Likely to Take Pleasure Trip in Canada

Base: Residents of Canada 18 Years and Older

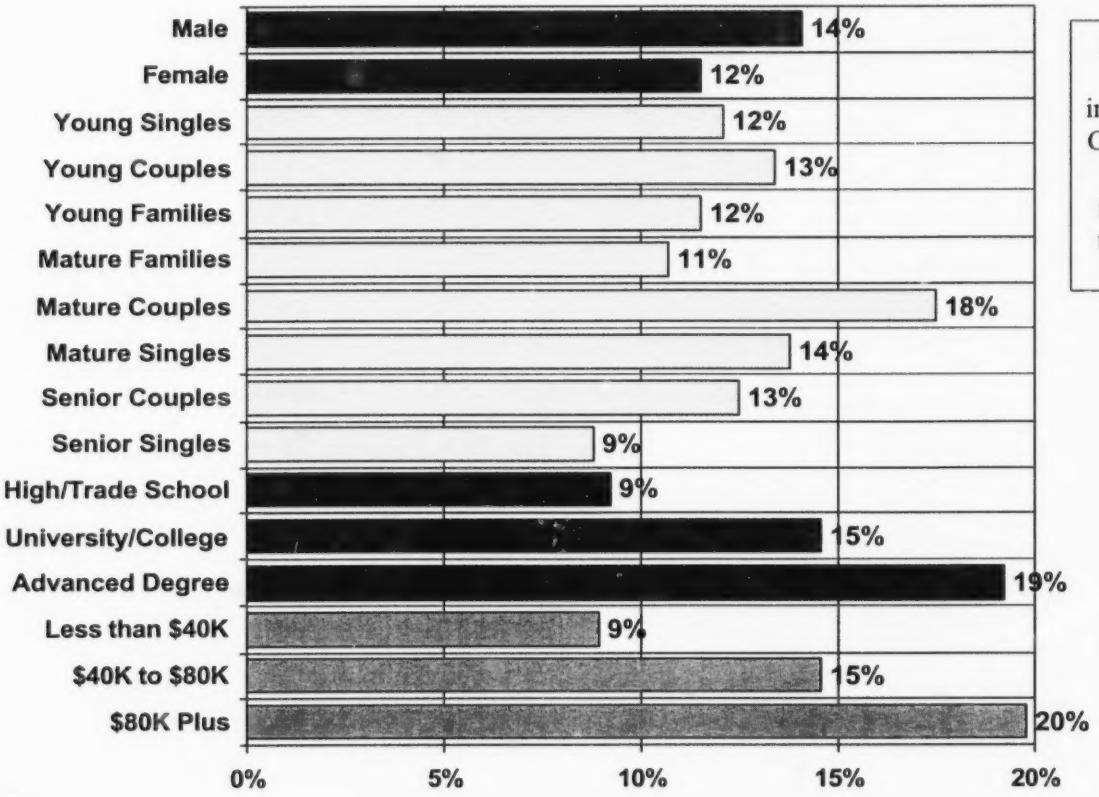


The five affluent segments were more likely to take a domestic pleasure trip during the next two years. Among the seven mainstream segments, intentions to travel within Canada tend to decline as a function of the age of the respondent.

Percent of U.S. Population (18 Plus) With Intentions to Take Pleasure Trip to Canada in Next two years

Percent Likely to Take Overnight Pleasure Trip to Canada

Base: Residents of United States 18 Years and Older

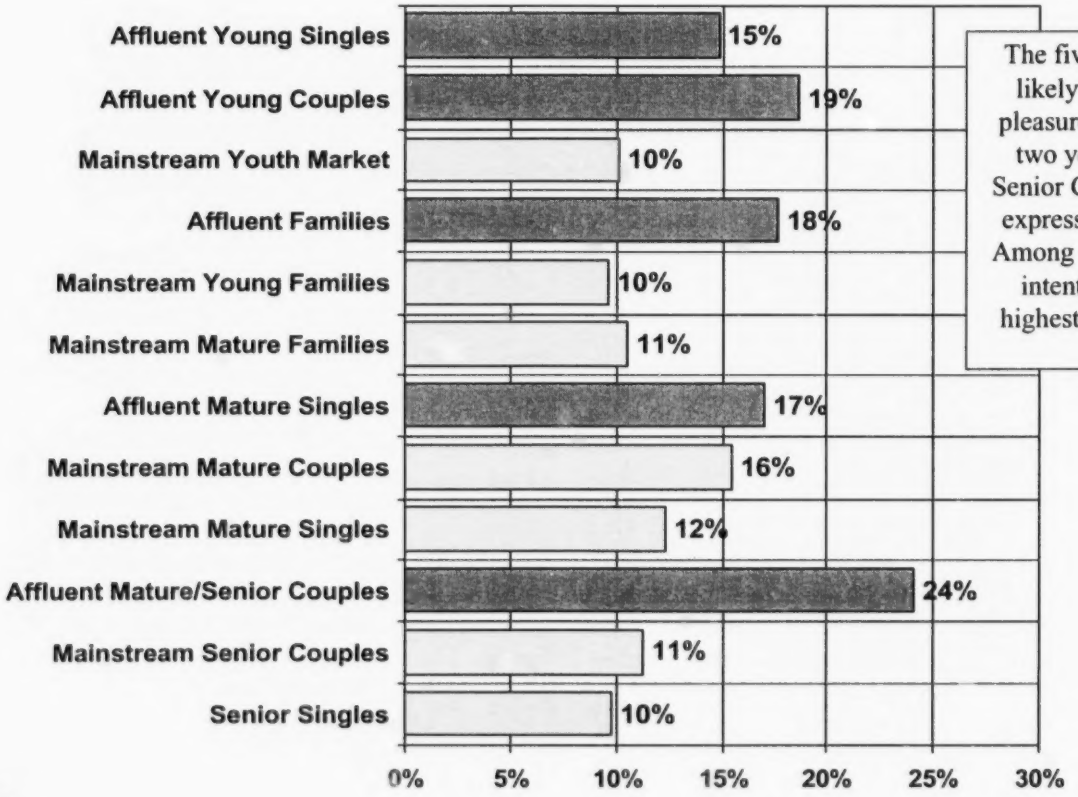


American Mature Couples were the most likely to express intentions to take a pleasure trip to Canada during the next two years. Intentions to travel to Canada increase sharply as a function of the respondent's education level and household income.

Percent of U.S. Population (18 Plus) With Intentions to Take Pleasure Trip to Canada in Next two years

Percent Likely to Take Overnight Pleasure Trip to Canada

Base: Residents of United States 18 Years and Older

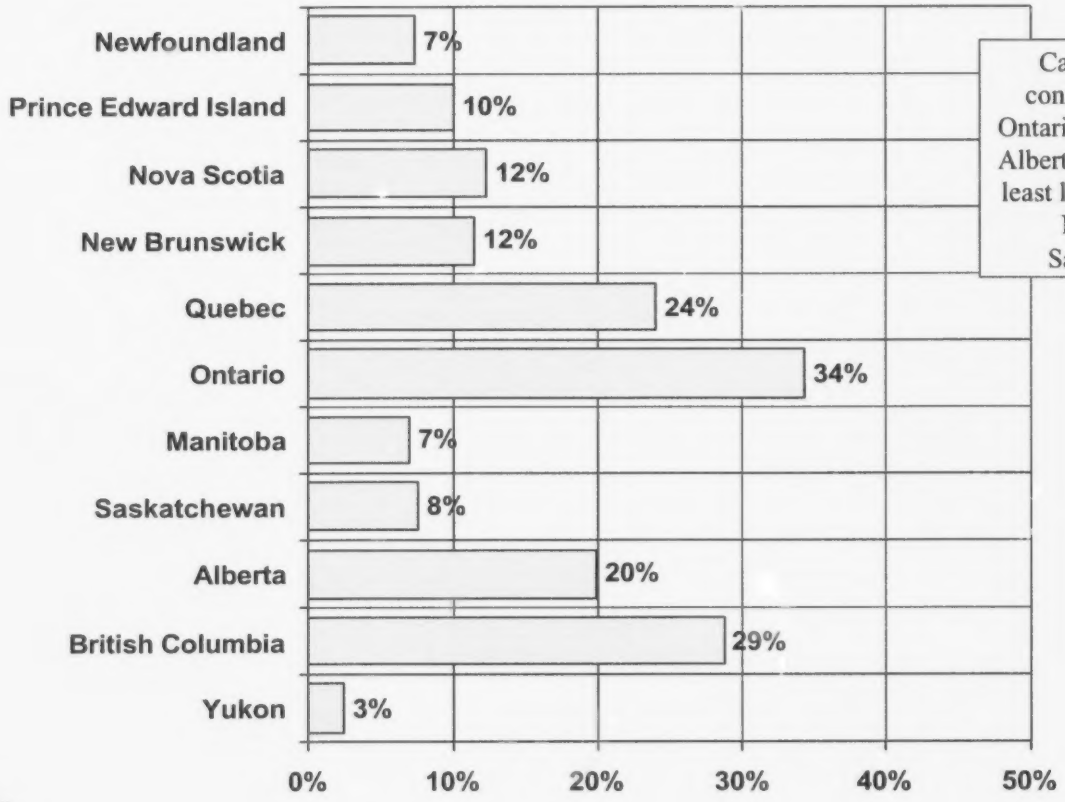


The five affluent segments were more likely to express intentions to take a pleasure trip to Canada during the next two years. The Affluent Mature and Senior Couples were especially likely to express intentions to travel to Canada. Among the seven mainstream segments, intentions to travel to Canada were highest among the Mainstream Mature Couples.

Percent of Canadian Population With Intentions to Take Pleasure Trips in Canada in Next two years

By Province Likely to Travel To

Base: Residents of Canada 18 Years and Older

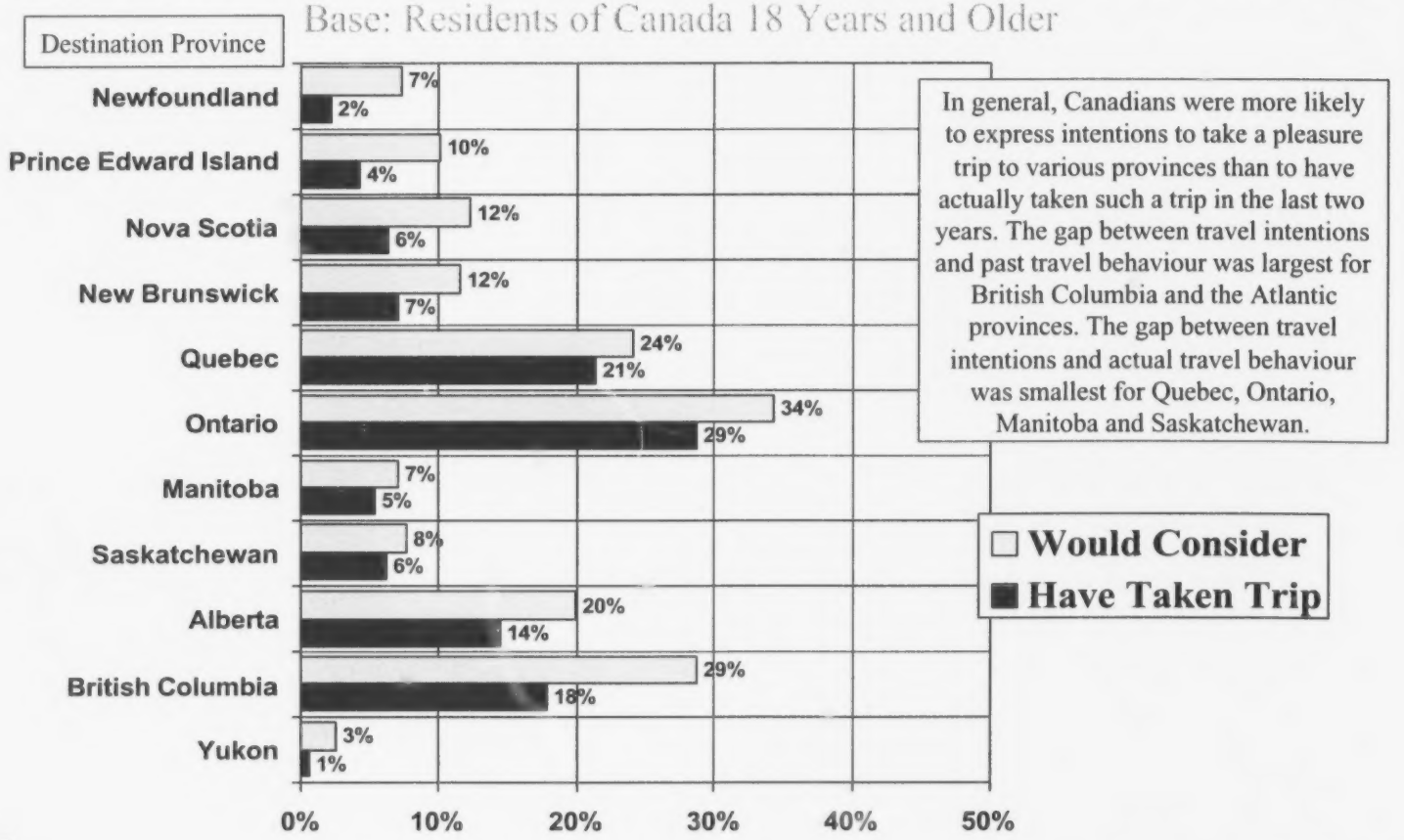


Canadians were most likely to consider taking a pleasure trip to Ontario, British Columbia, Quebec or Alberta during the next two years and least likely to be considering a trip to Newfoundland, Manitoba, Saskatchewan or the Yukon.

Percent of Canadian Population (18 Plus) With Intentions vs. Past Travel Behavior

By Province Likely to Travel To/Previously Traveled To

Base: Residents of Canada 18 Years and Older

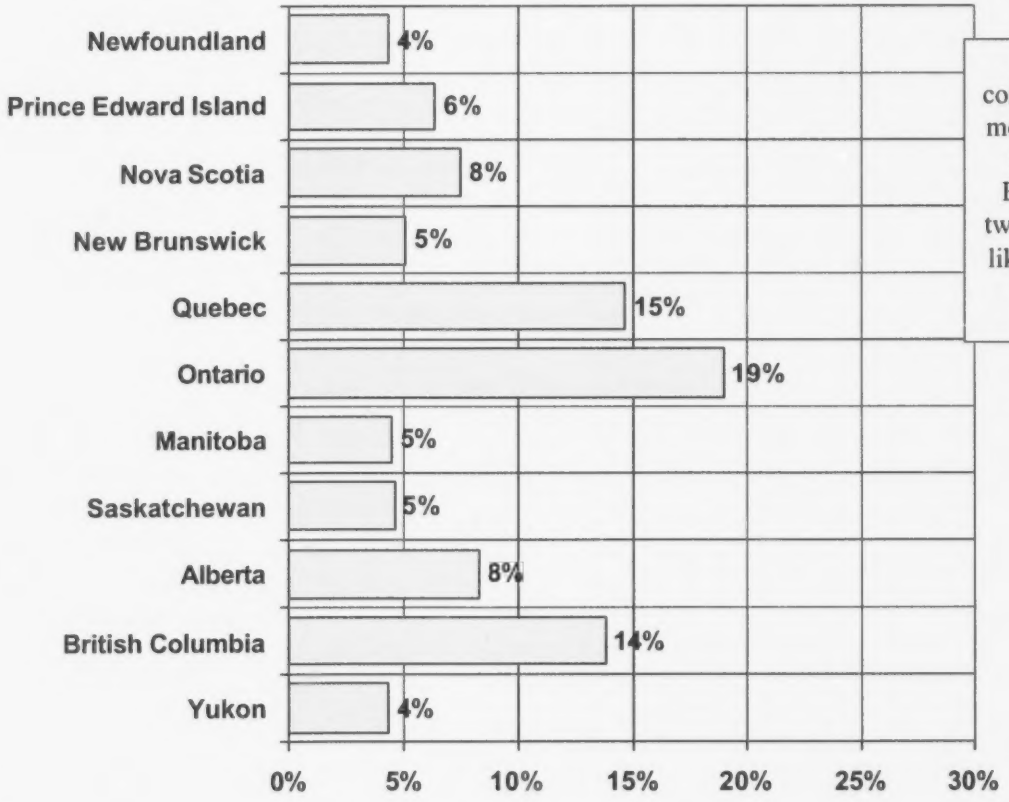


In general, Canadians were more likely to express intentions to take a pleasure trip to various provinces than to have actually taken such a trip in the last two years. The gap between travel intentions and past travel behaviour was largest for British Columbia and the Atlantic provinces. The gap between travel intentions and actual travel behaviour was smallest for Quebec, Ontario, Manitoba and Saskatchewan.

Percent of U.S. Population (18 Plus) With Intentions to Take Overnight Pleasure Trips to Canada in Next two years

By Province Likely to Travel To

Base: Residents of United States 18 Years and Older

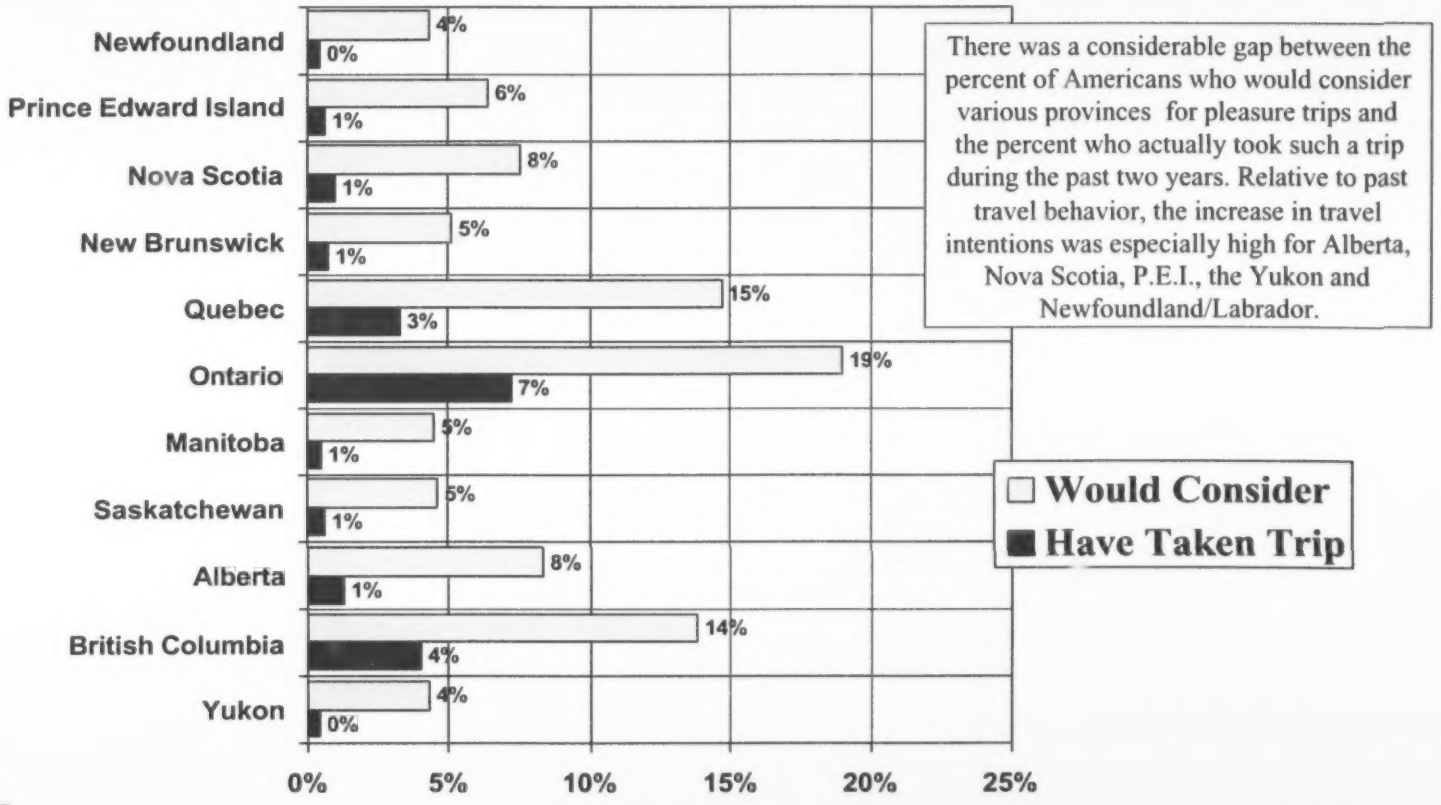


Americans were most likely to consider taking a pleasure trip to the more populous provinces in Canada including Ontario, Quebec and British Columbia during the next two years. Americans were the least likely to be considering a trip to the Atlantic provinces, Manitoba, Saskatchewan and the Yukon.

Percent of Total U.S. Population (18 Plus) With Intentions vs. Past Travel Behavior

By Province Likely to Travel To/Previously Traveled To

Base: Residents of United States 18 Years and Older



There was a considerable gap between the percent of Americans who would consider various provinces for pleasure trips and the percent who actually took such a trip during the past two years. Relative to past travel behavior, the increase in travel intentions was especially high for Alberta, Nova Scotia, P.E.I., the Yukon and Newfoundland/Labrador.

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Reasons for Not Considering a Pleasure Trip To Canada During Next Two Years: Canada vs. U.S.

Base: Those who have not traveled and are not likely to travel to Canada

The reasons for not traveling in Canada were quite different among Canadians and Americans. Canadians were most likely not to consider a pleasure trip in Canada because they perceived it to be too expensive, because of poor weather, because they had other places they wanted to visit first, or because they were too busy to travel. Americans were not likely to consider Canada for a pleasure trip because they perceived it as too hard to get to, not offering things to see and do that interest them, or because it was too expensive.

	Canada Base: 10,259,329	U.S.A. Base 81,723,113
Too hard to get there:	4.1%	12.8 %
Too far to travel:	0.5 %	9.9 %
Nothing to see or do that appeals to me:	4.7 %	8.2 %
Canada is too expensive:	21.5 %	7.0 %
No family or friends to visit:	2.0 %	5.4 %
Poor weather:	18.2 %	5.2 %
Have never thought of traveling to Canada:	2.6 %	5.2 %
Language difficulties:	0.0 %	4.9 %
Other places I want to visit:	14.2 %	4.3 %
Too busy to travel:	18.5 %	3.2 %
Personal reasons:	7.6 %	2.9 %
Have already traveled to/in Canada:	7.2 %	1.5 %

Reasons for Not Considering a Pleasure Trip To Ontario During Next Two Years: Canada vs. U.S.

Base: Those who may travel to Canada, but not Ontario and have not traveled to Ontario in past two years

Those who were considering a trip in Canada, but not to Ontario, were asked why not. About one in four had no particular reason for not considering Ontario. "Nothing to see or do that appeals to me" and "too far to travel to Ontario" were the most common reasons for both Canadians and Americans. Canadians were more likely not to consider a pleasure trip to Ontario because they did not have family or friends to visit, they had already been to Ontario, or because they perceived Ontario to be too expensive. Americans were not likely to consider Ontario for a pleasure trip because they felt it was too hard to get to, or because they perceived it to have poor weather.

	Canada Base: 4,610,226	U.S.A. Base: 5,541,599
No particular reason	24.8 %	25.0 %
Nothing to see or do that appeals to me:	19.6 %	17.8 %
Too far to travel to Ontario:	15.9 %	14.0 %
No family or friends to visit:	23.5 %	1.7 %
Ontario is too expensive:	18.6 %	1.3 %
Too hard to get to Ontario destinations:	1.4 %	10.7 %
Other places I want to visit first:	9.9 %	3.2 %
Have already traveled to/in Ontario:	11.2 %	1.4 %
Have never thought of traveling to Ontario:	3.1 %	7.1 %
Poor weather:	1.0 %	5.0 %
Language difficulties:	2.0 %	1.6 %
Too busy to travel:	1.9 %	1.9 %

Section Six

Non-Travelers

Those Who Have Not Traveled in the Last Two Years or Do Not Plan to Travel in the Next Two Years

Non-Travelers

Those Who Have Not Traveled or Do Not Plan to Travel

- Key Findings -

15.7 % of the North American market did not take an overnight trip (for any purpose) in the past two years, and do not plan to take a pleasure trip in the next two years. 8.0 % took an overnight trip in the past two years, but do not have intentions to take an overnight trip in the next two years. 7.0 % did not take an overnight trip in the past two years, but plan to take an overnight trip in the next two years.

The incidence of "Non-travelers" increased with the age of the respondent, and was highest among households with incomes below $40,000. In terms of the market segments, Mainstream Mature Singles, Senior Singles and Mainstream Senior Couples were the most likely to be non-travelers.

The primary reason for not traveling was that it was perceived to "cost too much" (41 %). Other common reasons for not traveling include "do not get enough time off work", "too old to travel", "illness or infirmity, and "everything I need is in place where I live".

The reasons for not traveling varied widely across the market segments. The Youth and Mature segments often do not travel because of lack of time off work and lack of money for travel. The Families segments often do not travel because they have small children and the Senior segments often do not travel because of illness, infirmity or their age.

Non-Travelers

Those Who Have Not Traveled or Do Not Plan to Travel

- Research Method -

Those who had not taken any trips in the last two years and/or did not plan to take a trip in the next two years were asked the reasons for this absence of travel (Note: Respondents were read a list of possible reasons for not traveling).

The sample was divided into three types of non-travelers:

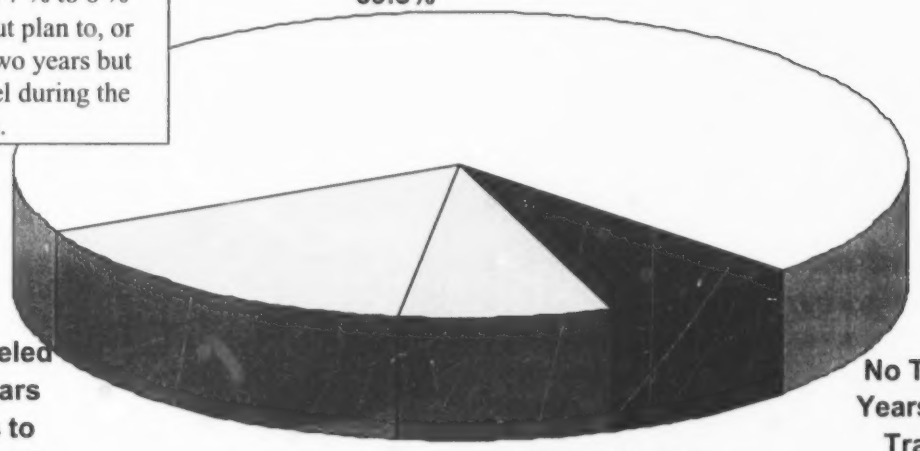
- Those who did not take an overnight trip (for any purpose) in the last two years, but were very or somewhat likely to take an overnight trip in the next two years [Non-travelers with intentions]
- Those who had taken an overnight trip (for any purpose) in the last two years, but were not likely or did not know whether they would take an overnight trip in the next two years [Travelers with no travel intentions]
- Those who had not taken an overnight trip (for any purpose) in the last two years and were not likely or did not know whether they would take an overnight trip in the next two years [Non-travelers with no travel intentions]

Total Canadian and U.S. Population (18 Plus)

Travel (For Any Purpose) During Past Two Years and Travel Intentions (For Any Purpose) During Next Two Years

Base: Residents of Canada and the United States 18 Years and Older

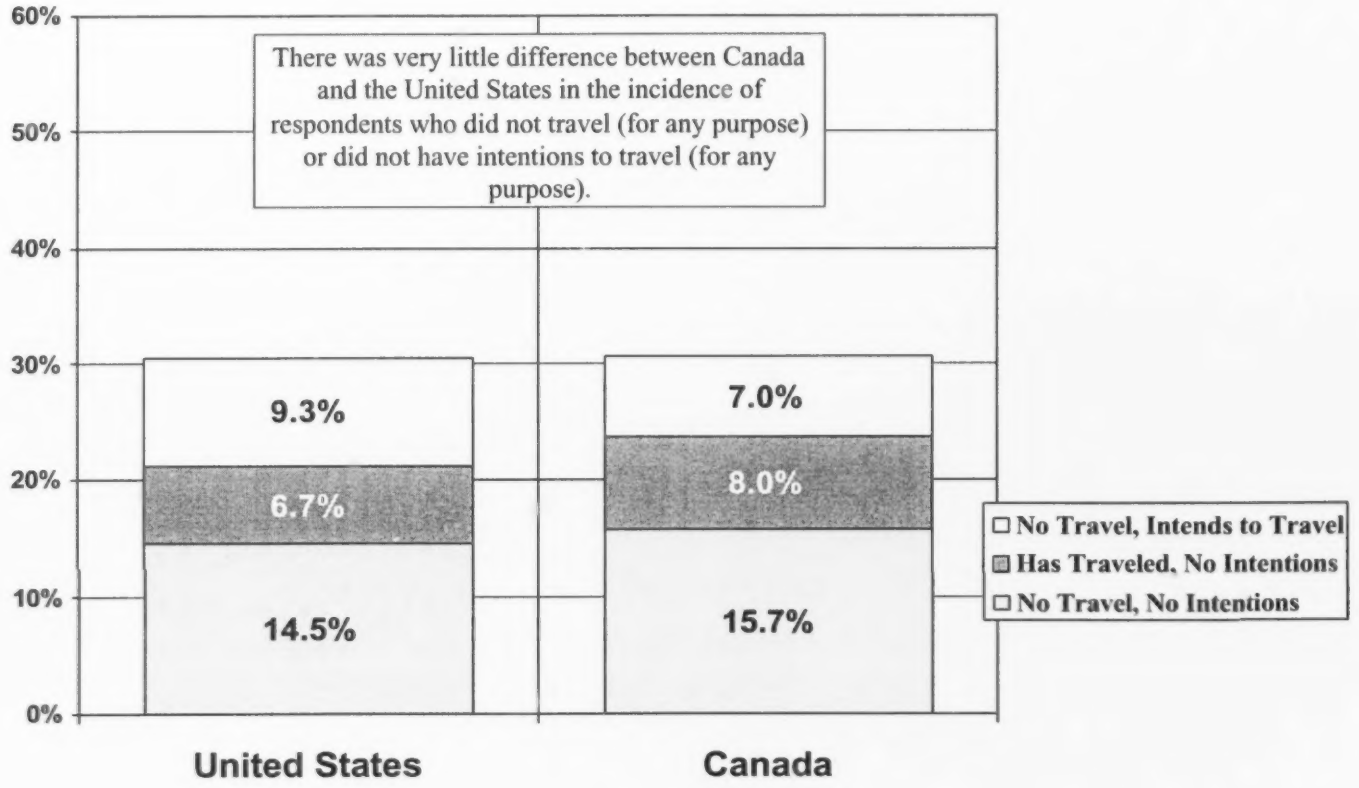
Overall, 69.3 % of the respondents took a trip in the last two years and were very or fairly likely to travel in the next two years. 15.7 % have neither traveled nor plan to travel, while about 7 % to 8 % either have not traveled, but plan to, or have traveled in the past two years but have no intentions to travel during the next two years.



Total Canadian and U.S. Population (18 Plus)

Percent of Population Non-Travelers

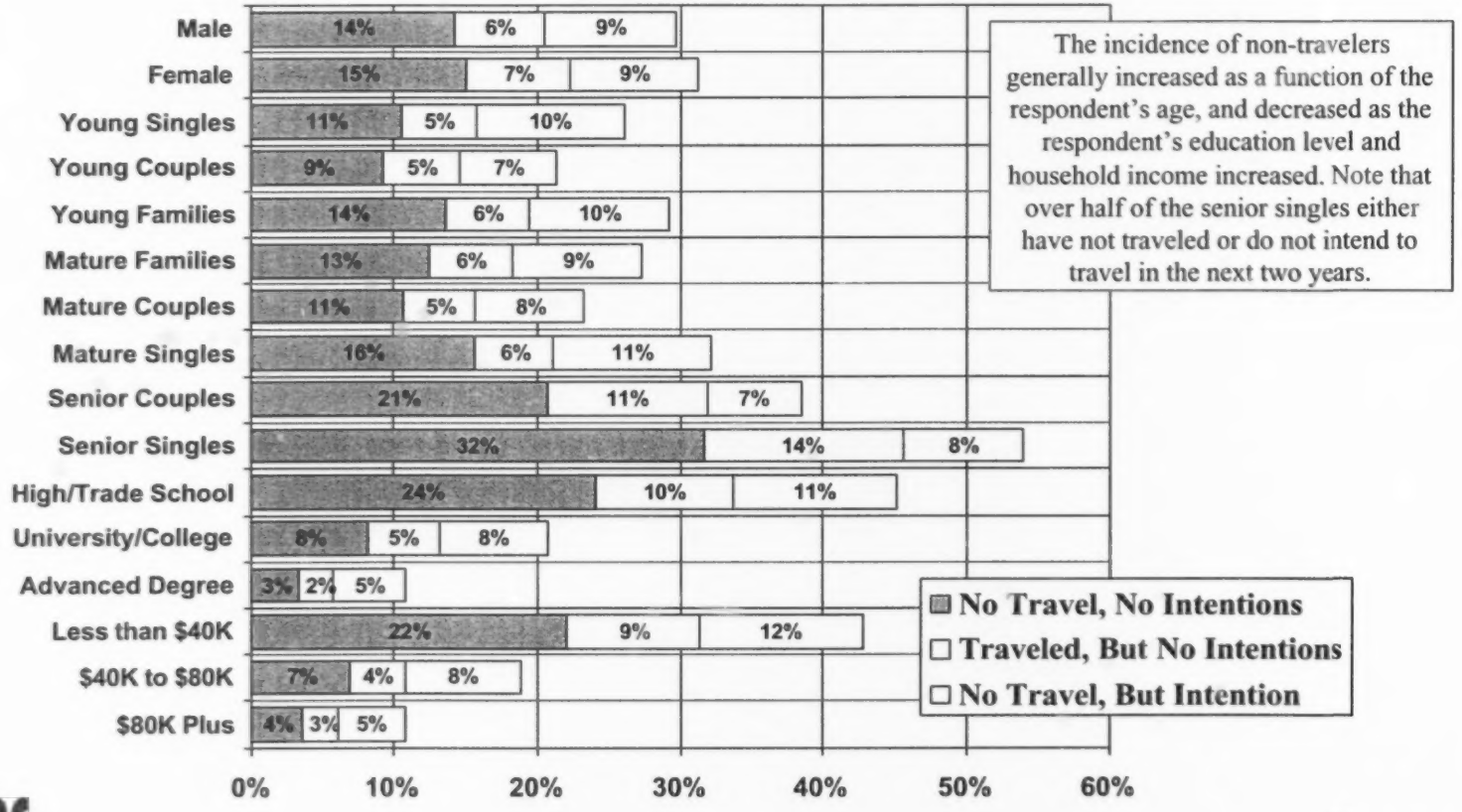
Base: Residents of Canada and the United States 18 Years and Older



Canadian and U.S. Population (18 Plus)

Percent of Non-Travelers By Demographics

Base: Residents of Canada and the United States 18 Years and Older

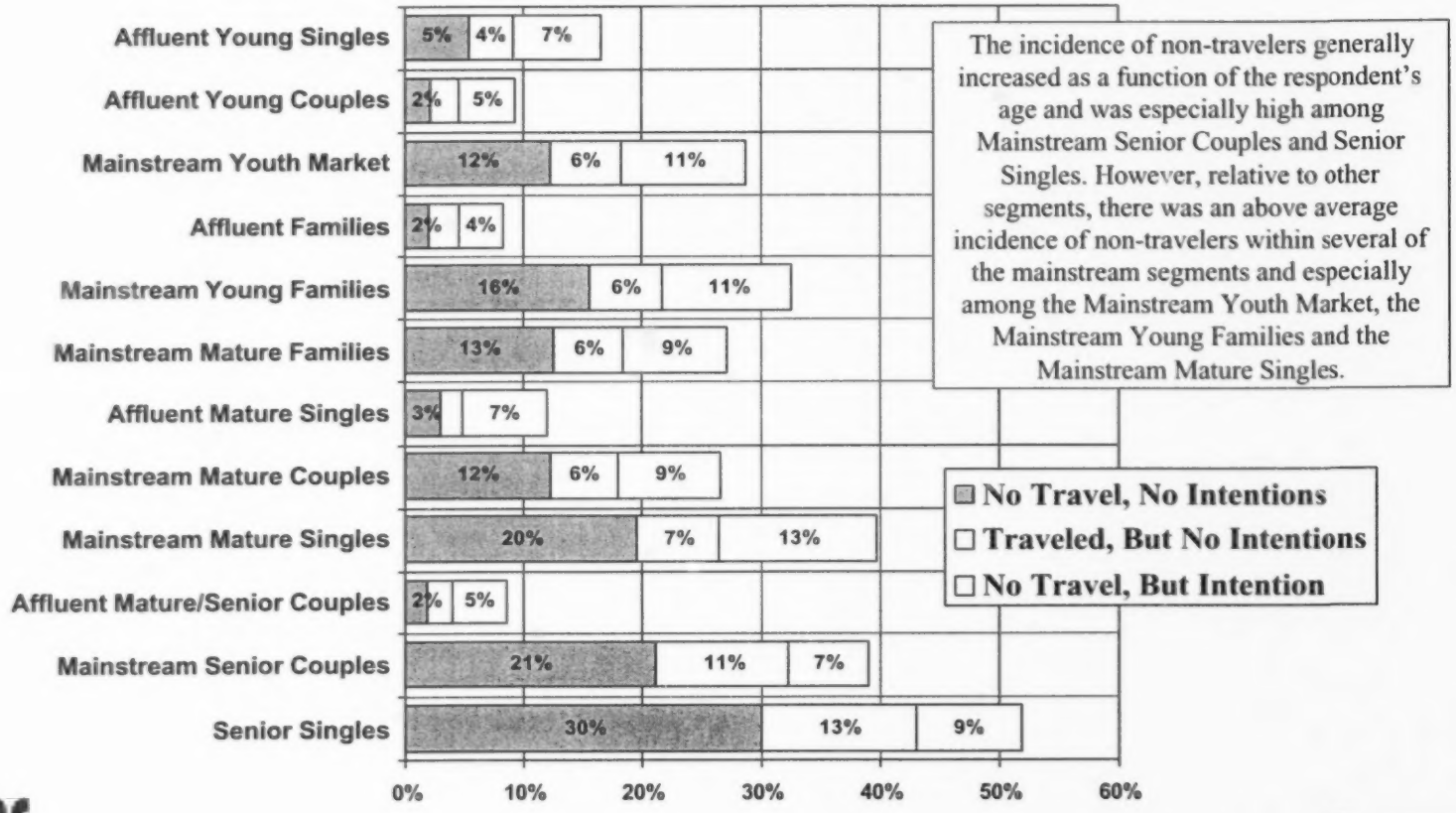


The incidence of non-travelers generally increased as a function of the respondent's age, and decreased as the respondent's education level and household income increased. Note that over half of the senior singles either have not traveled or do not intend to travel in the next two years.

Canadian and U.S. Population (18 Plus)

Percent of Non-Travelers By Market Segment

Base: Residents of Canada and the United States 18 Years and Older



The incidence of non-travelers generally increased as a function of the respondent's age and was especially high among Mainstream Senior Couples and Senior Singles. However, relative to other segments, there was an above average incidence of non-travelers within several of the mainstream segments and especially among the Mainstream Youth Market, the Mainstream Young Families and the Mainstream Mature Singles.

Reasons for Not Traveling in Last Two Years or Not Intending To Travel in the Next Two Years

Base: Residents of Canada and U.S. (18 Plus) who have not traveled or do not intend to travel

The most common reason for not traveling was because of the cost of travel. These individuals were also unlikely to travel because they did not have enough time off work, because of their age or illness/infirmity, or because they had small children. Constraints such as work, parental responsibilities or other major expenses often account for an absence of recent travel, despite future travel plans. On the other, those who cited age or illness/infirmity as the reasons for not traveling recently were less likely to have future travel plans.

	No Travel No Plans Base: 32,786,000	Have Traveled No Plans Base: 15,183,000	No Travel Have Plans Base: 20,190,000
Cost too much to travel:	41.1 %	41.6 %	44.7 %
Because do not get enough time off from work:	25.9 %	24.8 %	38.2 %
Because of age:	21.3 %	21.0 %	9.2 %
Because everything I need is in place where I live:	19.2 %	19.6 %	14.5 %
Because of illness or infirmity:	18.6 %	15.0 %	8.7 %
Because have small children or babies:	16.1 %	14.5 %	20.1 %
Because of other major expense such as tuition:	14.1 %	17.9 %	20.9 %
Because there is no place they really want to go:	11.4 %	9.9 %	7.9 %
Because they have no one to travel with:	8.2 %	7.2 %	10.6 %

Reasons for Not Traveling in Last Two Years or Not Intending To Travel in the Next Two Years

Young Segments

Base: Residents of Canada and U.S. who have not traveled or do not intend to travel

The most common reason for not traveling among the Youth Segments was because of lack of time due to occupational contains or lack of money. Having other major expenses was also frequently cited as a reason for not traveling.

Affluent Young Singles:
1,739,500 Individuals

- Because do not get enough time off from work (47.7 %)
- Cost too much to travel (45.6 %)
- Because of other major expense such as tuition (27.7 %)

Affluent Young Couples:
458,000 Individuals

- Cost too much to travel (43.8 %)
- Because do not get enough time off from work (41.4 %)
- Because of other major expense such as tuition (41.6 %)

Mainstream Youth Market:
6,118,500 Individuals

- Cost too much to travel (50.9 %)
- Because do not get enough time off from work (50.0 %)
- Because of other major expense such as tuition (27.2 %)

Reasons for Not Traveling in Last Two Years or
Not Intending To Travel in the Next Two Years

Family Segments

Base: Residents of Canada and U.S. who have not traveled or do not intend to travel

The family segments often did not travel because of small children and because of the cost of travel. Not having enough time off work was also a common factor precluding travel among these segments.

Affluent Families:
990,700 Individuals

- Because have small children or babies (53.4 %)
- Because do not get enough time off from work (37.0 %)
- Cost too much to travel (24.8 %)

Mainstream Young Families:
13,624,000 Individuals

- Cost too much to travel (54.3 %)
- Because have small children or babies (53.4 %)
- Because do not get enough time off from work (39.6 %)

Mainstream Mature Families:
3,213,500 Individuals

- Cost too much to travel (51.4 %)
- Because do not get enough time off from work (41.3 %)
- Because of other major expense such as tuition (26.1 %)

Reasons for Not Traveling in Last Two Years or Not Intending To Travel in the Next Two Years

Mature Segments

Base: Residents of Canada and U.S. who have not traveled or do not intend to travel

Occupational constraints and the cost of travel were frequent reasons for not traveling within the Mature Segments. Mainstream Mature Singles and Mainstream Mature Couples also cited illnesses or infirmity to explain their lack of travel while Affluent Mature Singles were more likely to mentions that they have other major expenses which preclude travel at the present time.

Affluent Mature Singles:
1,105,000 Individuals

- Because do not get enough time off from work (36.4 %)
- Cost too much to travel (25.1 %)
- Because of other major expense such as tuition (12.7 %)

Mainstream Mature Couples:
6,193,000 Individuals

- Cost too much to travel (39.8 %)
- Because do not get enough time off from work (33.3 %)
- Because of illness or infirmity (16.5 %)

Mainstream Mature Singles:
6,210,000 Individuals

- Cost too much to travel (48.4 %)
- Because do not get enough time off from work (29.3 %)
- Because of illness or infirmity (19.7 %)

Reasons for Not Traveling in Last Two Years or Not Intending To Travel in the Next Two Years

Senior Segments

Base: Residents of Canada and U.S. who have not traveled or do not intend to travel

Seniors often cited illness or infirmity to explain their lack of travel. The cost of travel was also be a barrier to travel among the Mainstream Senior Couples and the Senior Singles. These sectors were also likely to say that they did not travel because they had everything they needed in the place where they live. Senior Singles also stated that they did not travel because they did not have anyone to travel with. The much younger Affluent Mature and Senior Couples often did not travel because of occupational constraints.

Affluent Mature & Senior Couples
694,000 Individuals

- Because do not get enough time off from work (29.2 %)
- Some other reason (24.1 %)
- Because of illness or infirmity (23.5 %)

Mainstream Senior Couples:
3,497,000 Individuals

- Because of illness or infirmity (35.4 %)
- Cost too much to travel (28.9 %)
- Because everything I need is in place where I live (19.7 %)

Senior Singles:
6,819,000 Individuals

- Cost too much to travel (32.5 %)
- Because of illness or infirmity (31.3 %)
- Because everything I need is in place where I live (23.4 %)
- Because have no one to travel with (21.3 %)

Section Seven

Day-To-Day Outdoor, Recreational, Entertainment and Cultural Activities

Day-To-Day Outdoor, Recreational, Entertainment and Cultural Activities

- Key Findings -

Telephone survey respondents were asked about their day-to-day outdoor, recreational, entertainment and cultural pursuits while not on vacation. This information was used to assess the relationship between day-to-day activities and those undertaken while on vacation.

The most common day-to-day outdoor activities include day outings to parks, gardening, camping/hiking/backpacking and biking. However, the strongest association between day-to-day outdoor activities and those pursued while on vacation were fishing, hunting, canoeing and kayaking.

The fitness and sports activities most often pursued were exercising at a fitness club, swimming, team sports and golfing. The strongest association between everyday fitness and sports activities and those participated in while on vacation include golf, downhill skiing, tennis, snowmobiling and cross-country skiing. All of these activities require a certain amount of skill and special equipment.

The most common types of entertainment pursued while not on vacation were dining in restaurants and attending professional sporting events. There was a comparatively weak association between the types of entertainment pursued while not on vacation and those activities undertaken while on vacation. This suggests that the pursuit of various forms of entertainment sought while on vacations are different from those sought day-to-day.

The most common cultural activities pursued while not on vacation were going to a musical concert, going to see live theatre or going to a museum or art gallery. As with entertainment, there was a relatively weak association between the types of cultural activities sought while on vacation and those sought while not on vacation. Exceptions to this trend are noted for the fine arts (e.g., ballet, opera) and live theatre.

Day-To-Day Outdoor, Recreational, Entertainment and Cultural Activities

- Research Method -

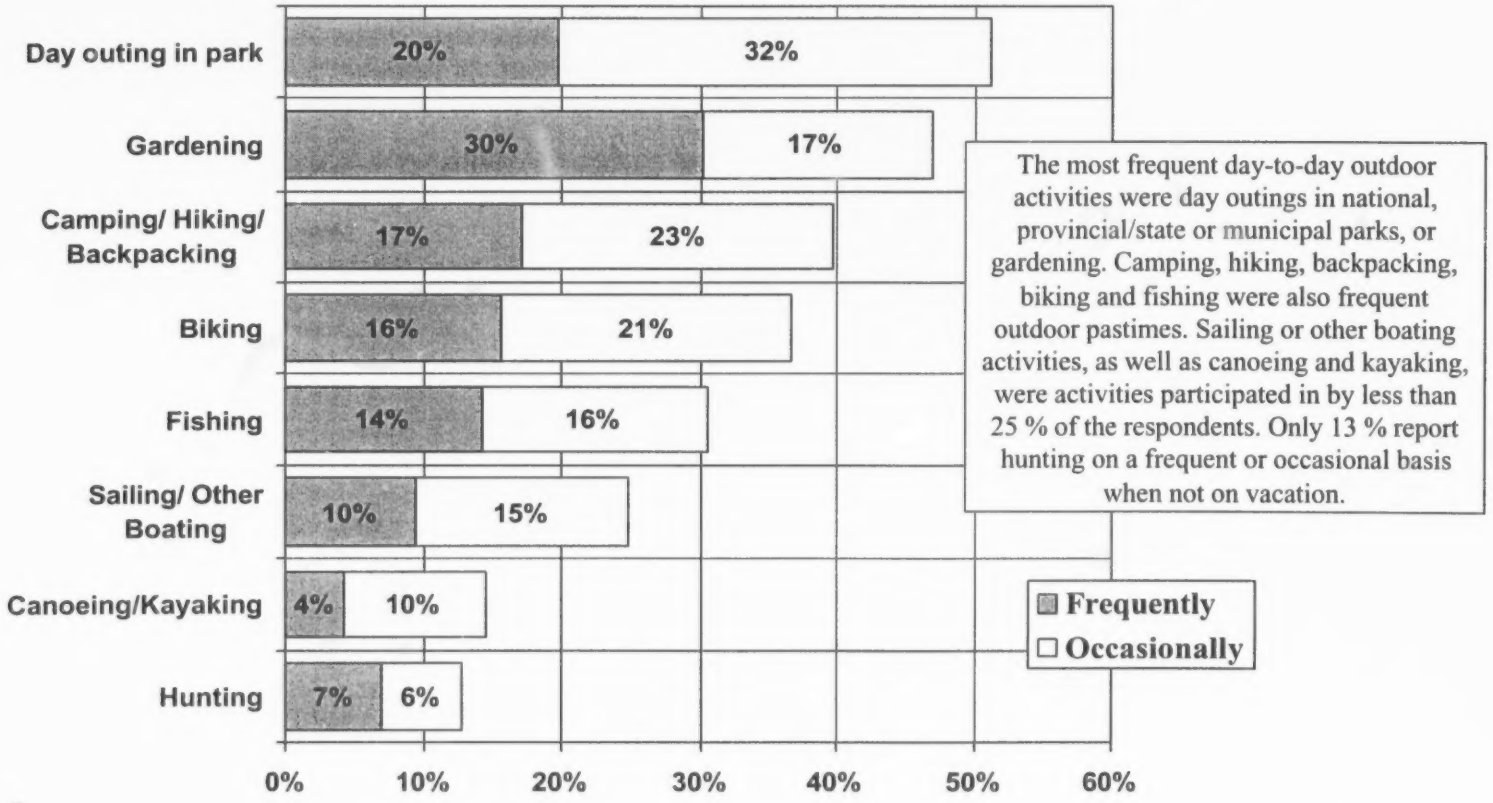
In the telephone survey, respondents were asked how often they participated in 30 day-to-day activities (frequently, occasionally, rarely, or not at all). These activities were divided into four categories:

- **Outdoor Activities** such as a day outing to a national or provincial/state park, gardening, fishing, hunting, camping/hiking/ backpacking, canoeing/kayaking, sailing or other boating activities, or biking
- **Sports and Fitness Activities** such as cross country or downhill skiing, snowmobiling, ice-skating, golf, racquet sports, team sports (football, baseball), exercise at home or at a fitness club, and swimming
- **Entertainment and Dining Activities** such as dancing, dining in fine restaurants, gambling in casinos, visiting amusement or theme parks, going to professional sports events, or going to a zoo or botanical garden
- **Cultural Activities** such as going to live theatre, the ballet, the opera, musical concerts, art galleries or art shows, museums or staying in a hotel or bed and breakfast within the respondent's own city or town

Percent of Population (18 Plus)

Active in Day-To-Day Outdoor Activities

Base: Residents of Canada and the United States 18 Years and Older

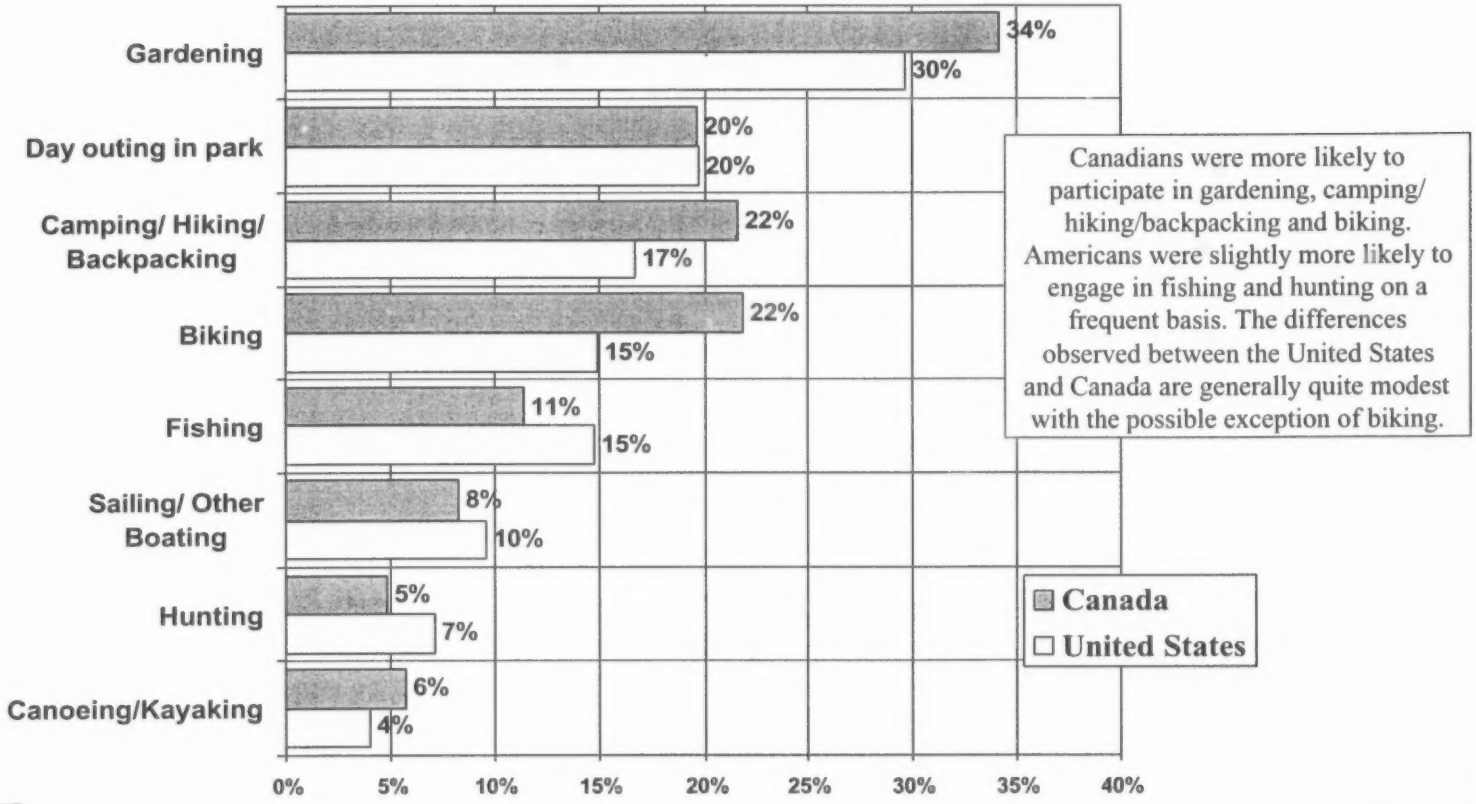


The most frequent day-to-day outdoor activities were day outings in national, provincial/state or municipal parks, or gardening. Camping, hiking, backpacking, biking and fishing were also frequent outdoor pastimes. Sailing or other boating activities, as well as canoeing and kayaking, were activities participated in by less than 25 % of the respondents. Only 13 % report hunting on a frequent or occasional basis when not on vacation.

Percent of Population (18 Plus)

Frequently Active in Day-to-Day Outdoor Activities

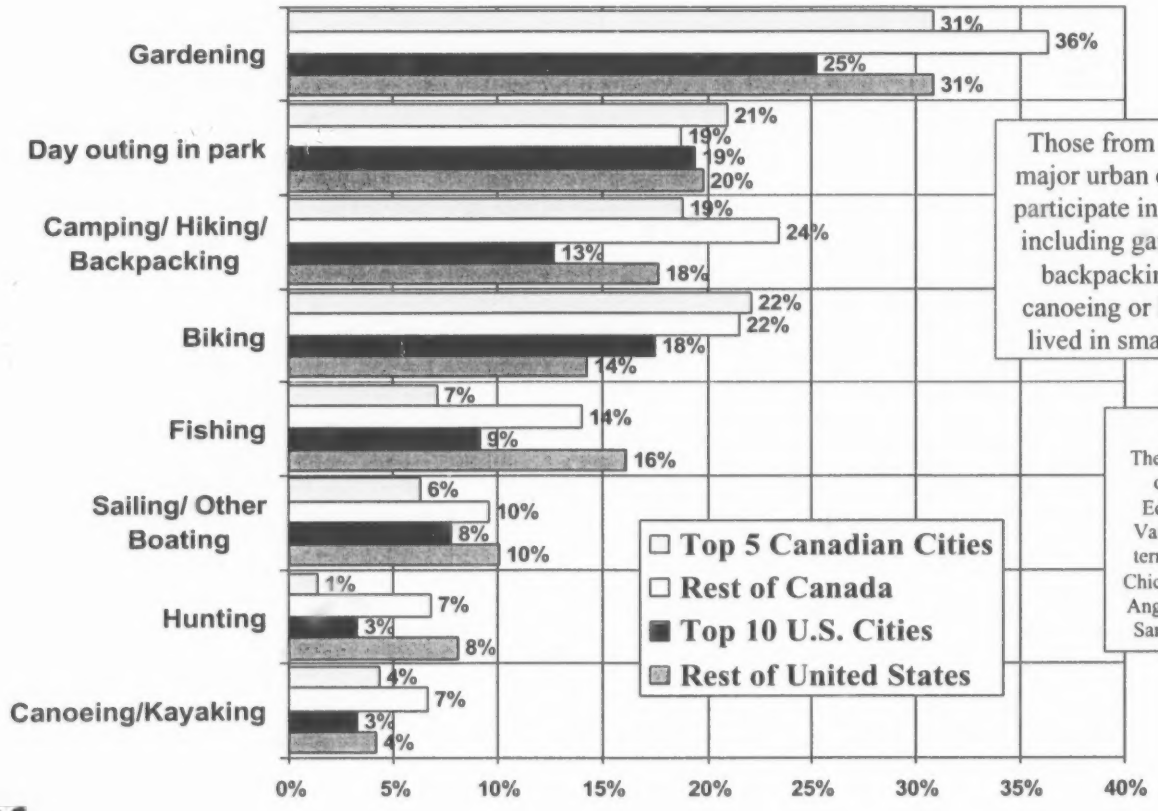
Canada versus United States



Percent of Population (18 Plus)

Frequently Active in Day-to-Day Outdoor Activities

Major Urban centres Versus Rest of Canada/United States



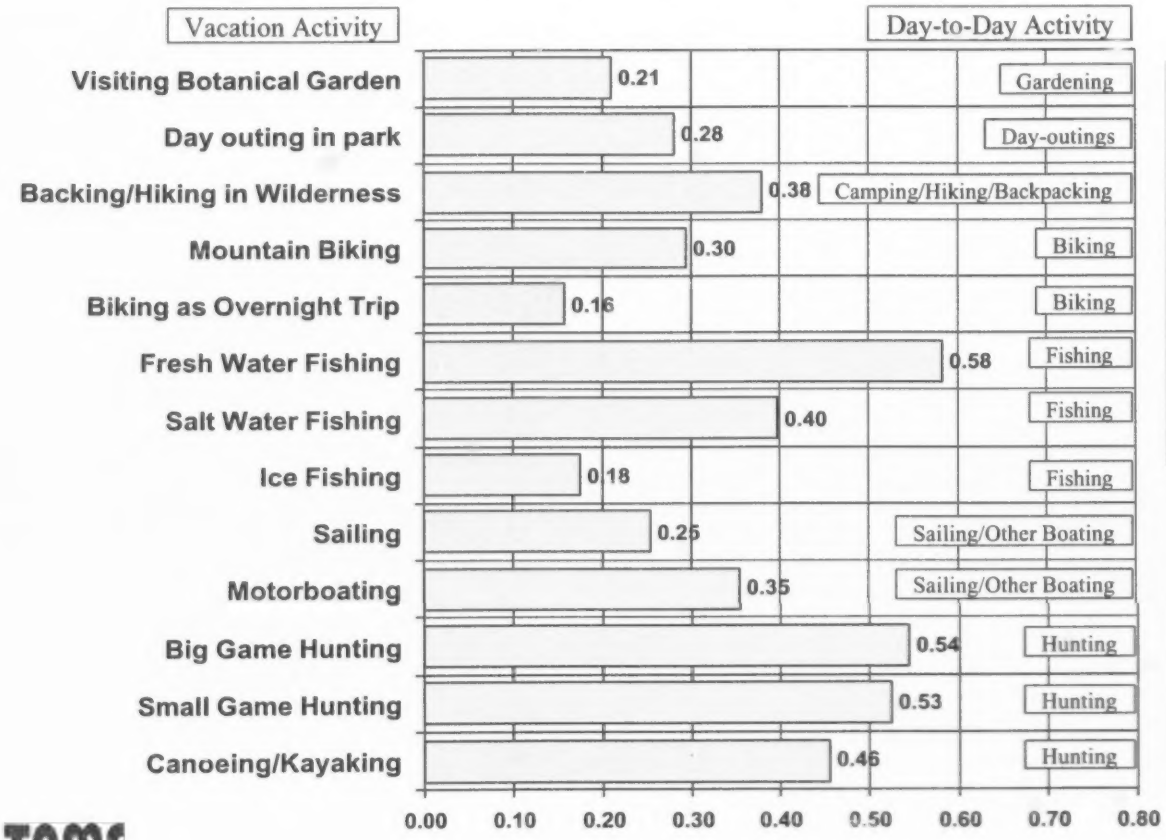
Those from large Canadian and U.S. major urban centres were less likely to participate in several outdoor activities including gardening, camping/hiking/ backpacking, fishing, hunting and canoeing or kayaking than those who lived in smaller urban or rural areas.

Technical Note

The top five Canadian cities, in terms of populations include Calgary, Edmonton, Montreal, Toronto and Vancouver. The top10 U.S. cities, in terms of population include Boston, Chicago, Dallas, Detroit, Houston, Los Angles, New York City, Philadelphia, San Francisco and Washington D.C.

Relationship Between the Incidence of Participation in Outdoor Activities When Traveling and When Not Traveling

Association Between Day-To-Day & Comparable Vacation Activities



There was a positive association between day-to-day outdoor activities and comparable vacation activities. This association was especially strong for fishing and hunting, and canoeing or kayaking. The weakest association was between fishing and ice fishing, and biking on an overnight tour, and biking day-to-day. Both of these vacation activities were quite rare.

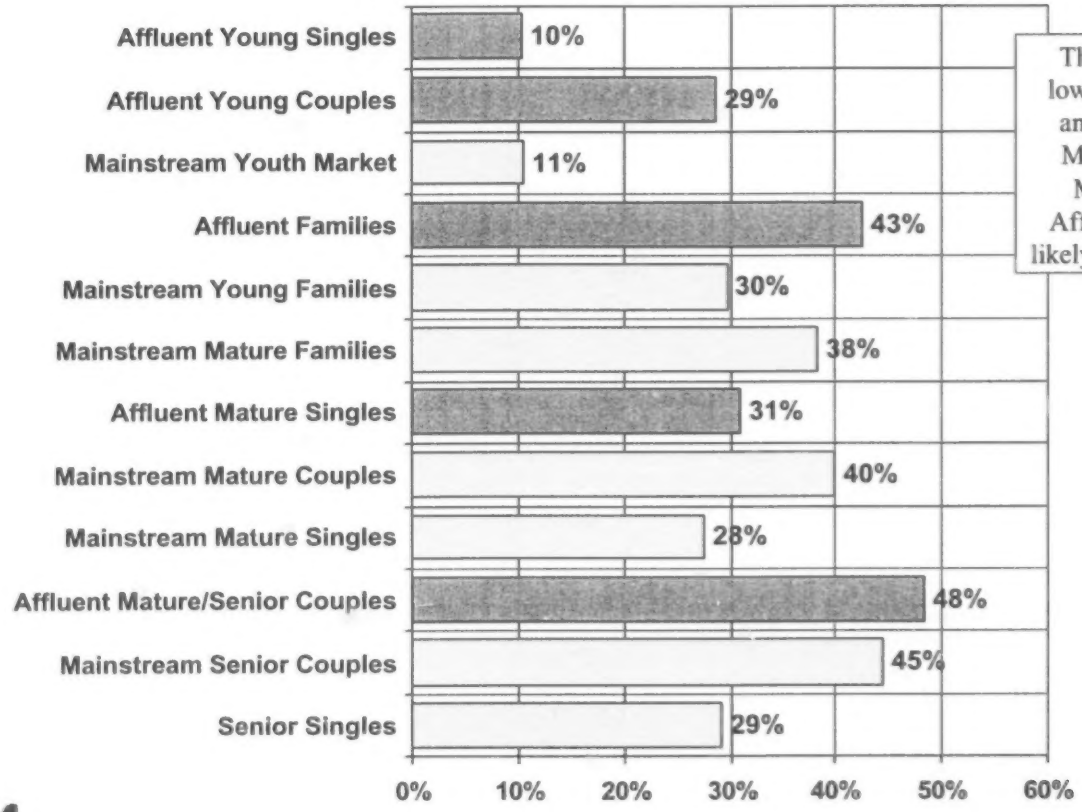
Technical Note

The association between day-to-day activities and vacation activities is based on the Cramér's V statistic which ranges from 0 to 1. A value of "0" means there is no association while a value of "1" means there is a perfect association. The Cramér's V statistic was derived by cross-tabulating the frequency with which the activity occurs day-to-day (frequently, occasionally, rarely, never) with whether the activity occurred on vacation during the last two years. This analysis is based on the mailback sample.

Percent of Population (18 Plus) Frequently Participating In

Gardening

By Market Segments: Canada and United States

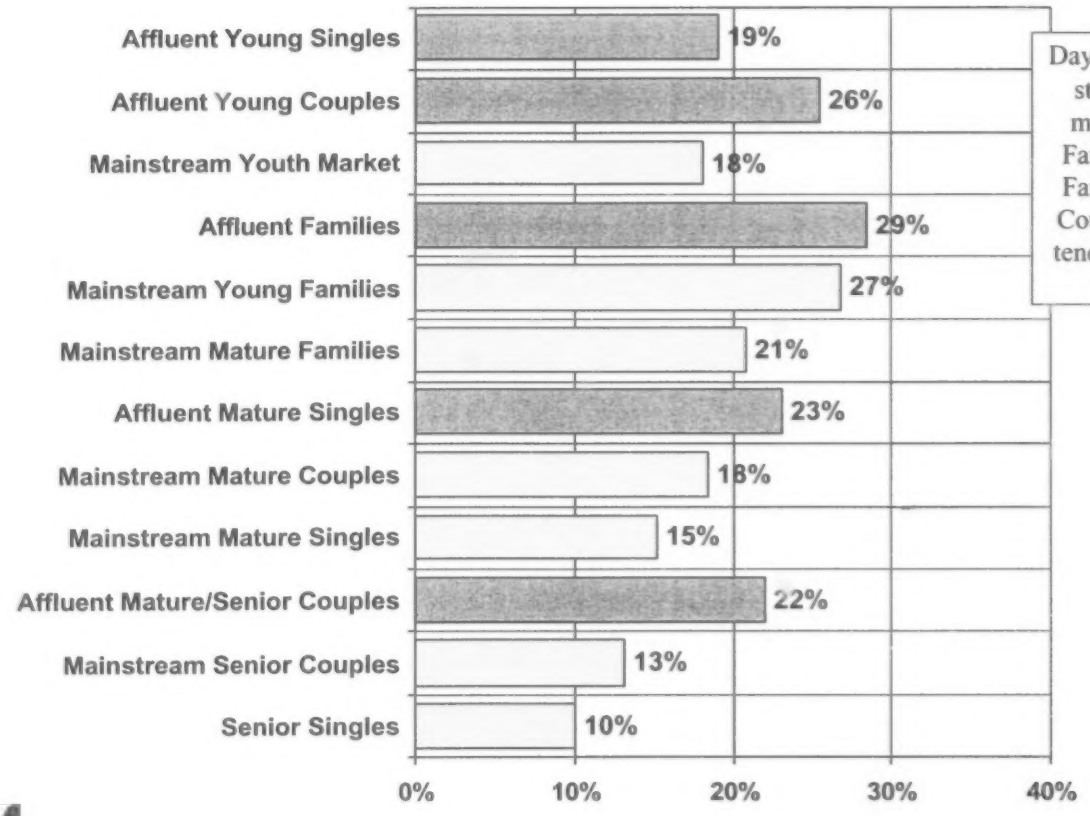


The incidence of gardening was lowest among the youth segments and highest among the Affluent Mature and Senior Couples and Mainstream Mature Couples. Affluent Families were also more likely to garden than other segments.

Percent of Population (18 Plus) Frequently Participating In

Day Outings in Park

By Market Segments: Canada and United States

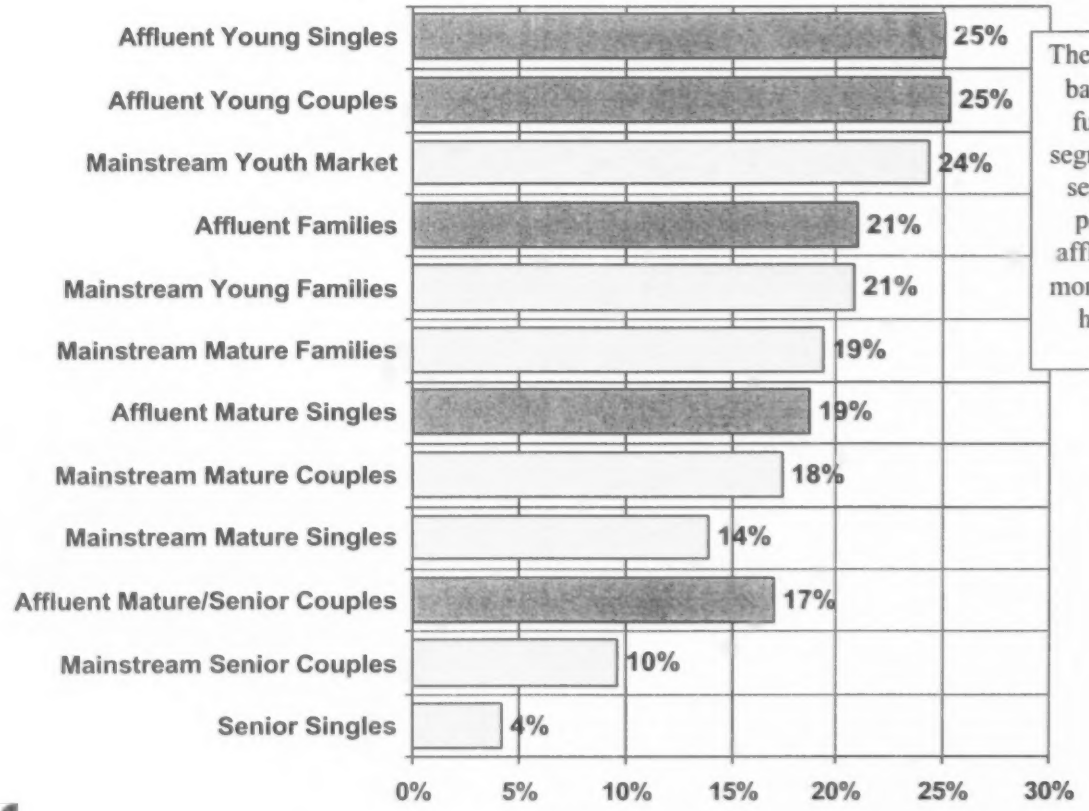


Day outings to national, provincial, state and municipal parks were most likely among the Affluent Families, the Mainstream Young Families and the Affluent Young Couples. Park-related day outings tended to decrease as a function of the age of the respondent.

Percent of Population (18 Plus) Frequently Participating In

Camping/Hiking/Backpacking

By Market Segments: Canada and United States



The incidence of camping, hiking and backpacking tended to decline as a function of the average age of the segment with individuals in the youth segments most likely to frequently participate in such activities. The affluent segments were only slightly more likely to participate in camping, hiking and backpacking than the mainstream segments.

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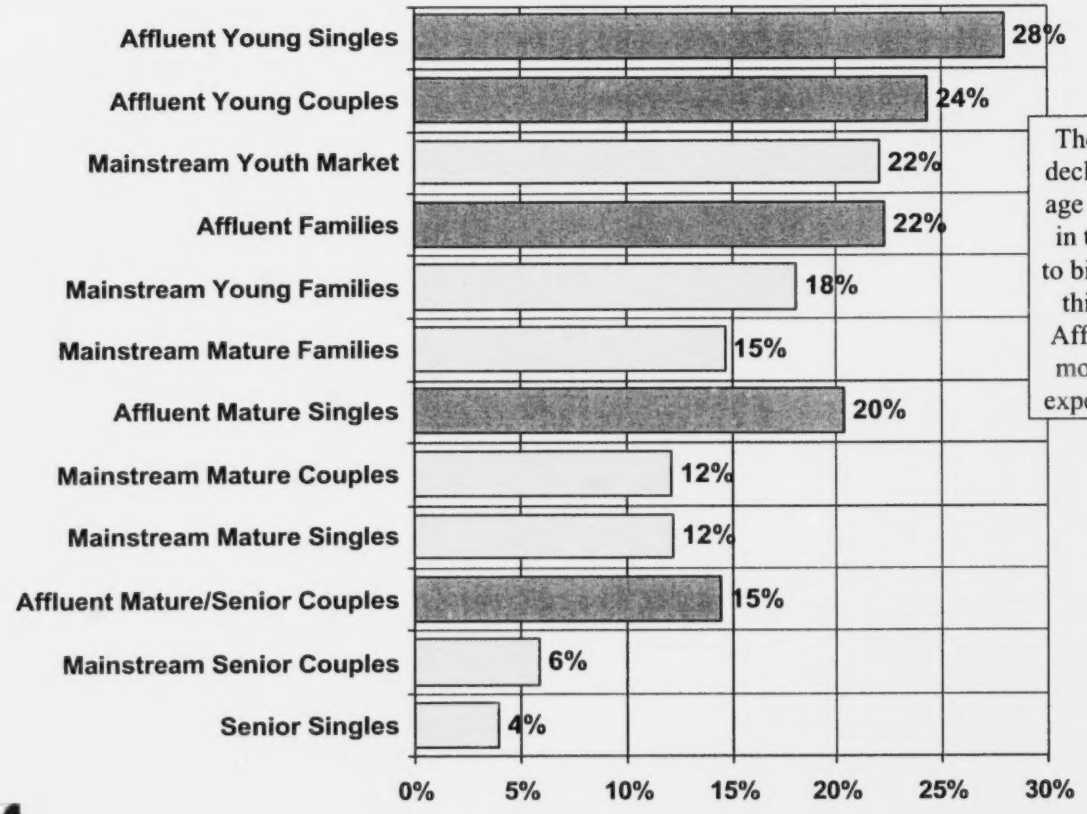
Percent of Population (18 Plus) Frequently Participating In

Biking

By Market Segments: Canada and United States

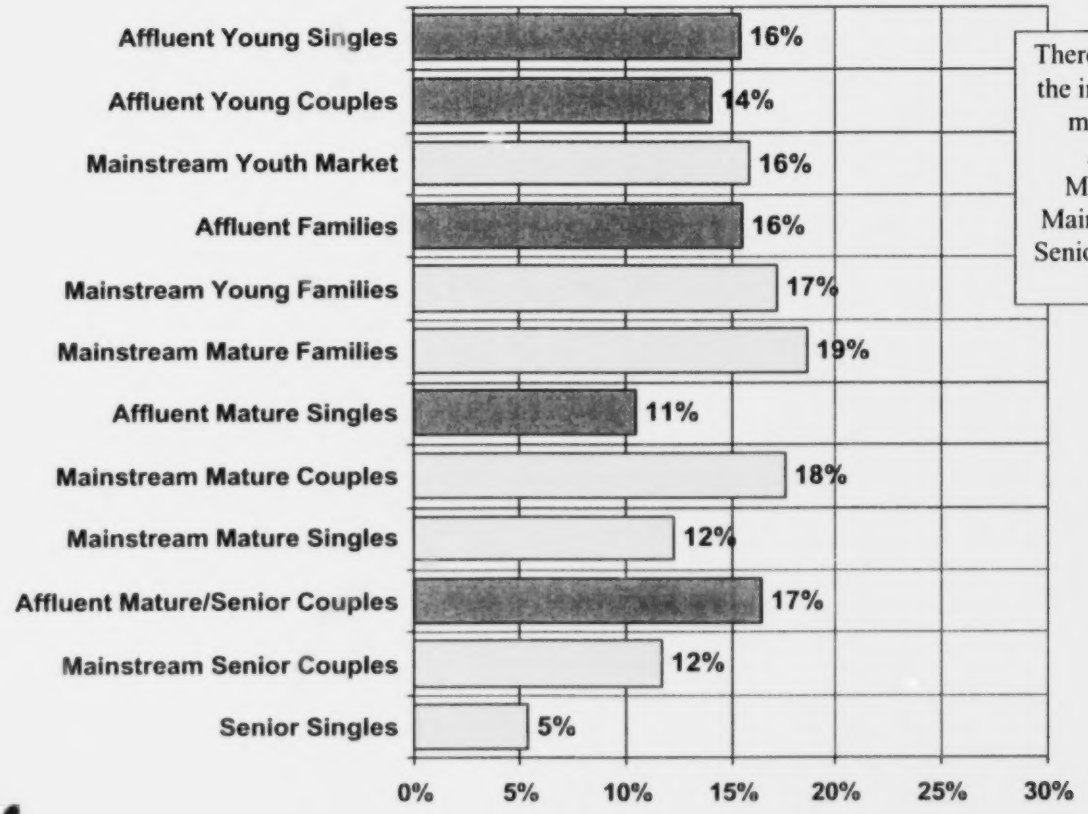


The incidence of biking tended to decline as a function of the average age of the segment with individuals in the youth segments most likely to bike frequently. One exception to this trend is observed among the Affluent Mature Singles who were more likely to bike than would be expected given their lifecycle stage.

Percent of Population (18 Plus) Frequently Participating In

Fishing

By Market Segments: Canada and United States

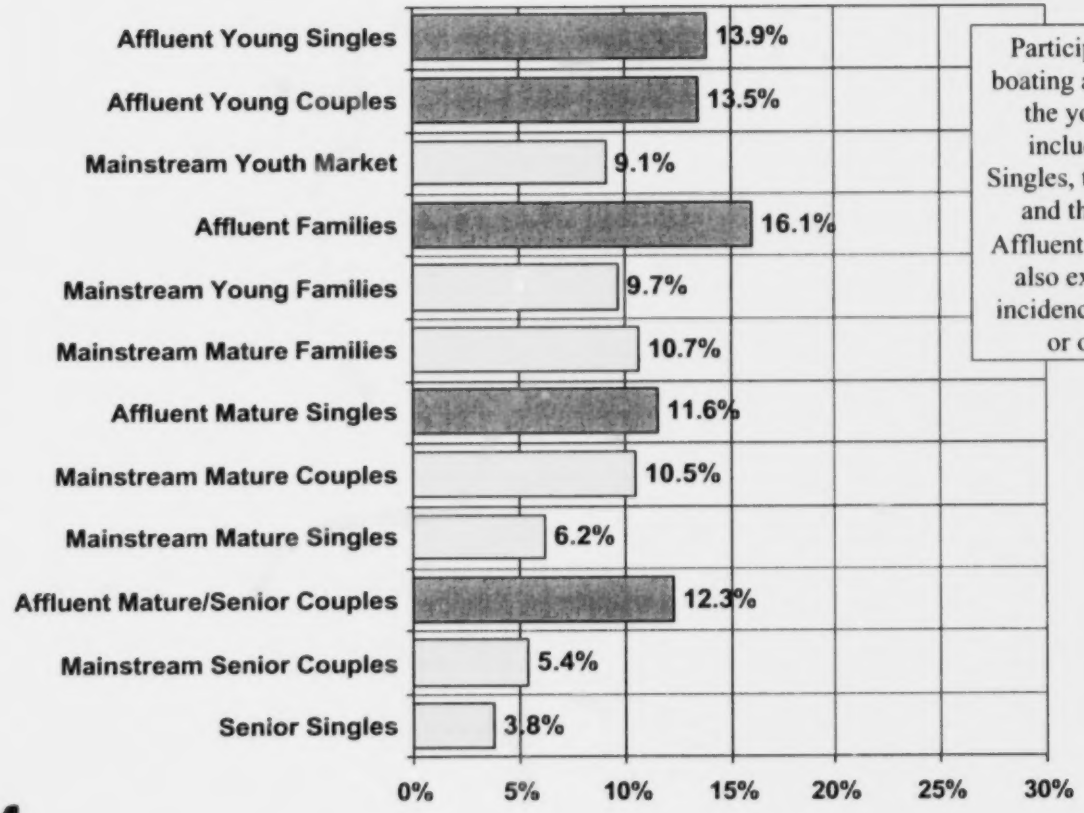


There was relatively little variation in the incidence of fishing across the 12 market segments. However, the Affluent Mature Singles,the Mainstream Mature Singles, the Mainstream Mature Couples and the Senior Singles were less likely to fish while not on vacation.

Percent of Population (18 Plus) Frequently Participating In

Sailing/Other Boating Activities

By Market Segments: Canada and United States

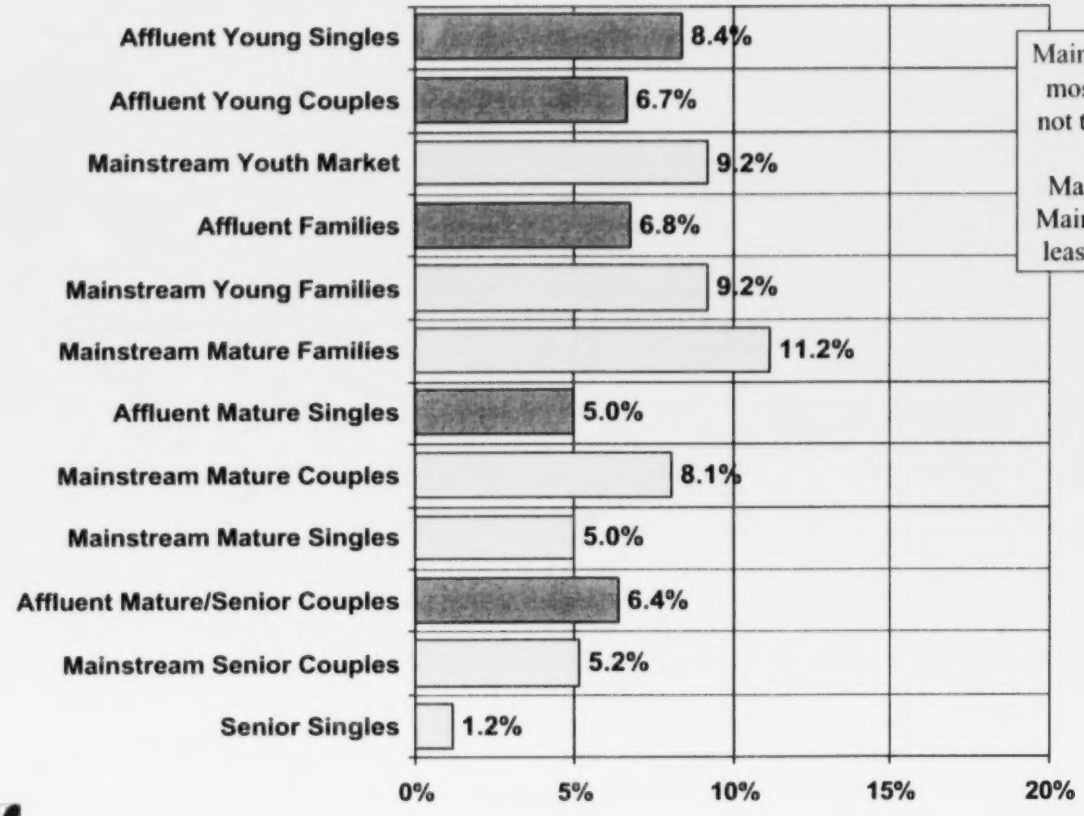


Participation in sailing and other boating activities was higher among the younger affluent segments including the Affluent Young Singles, the Affluent Young Couples and the Affluent Families. The Affluent Mature and Senior Couples also exhibited an above average incidence of participation in sailing or other boating activities.

Percent of Population (18 Plus) Frequently Participating In

Hunting

By Market Segments: Canada and United States

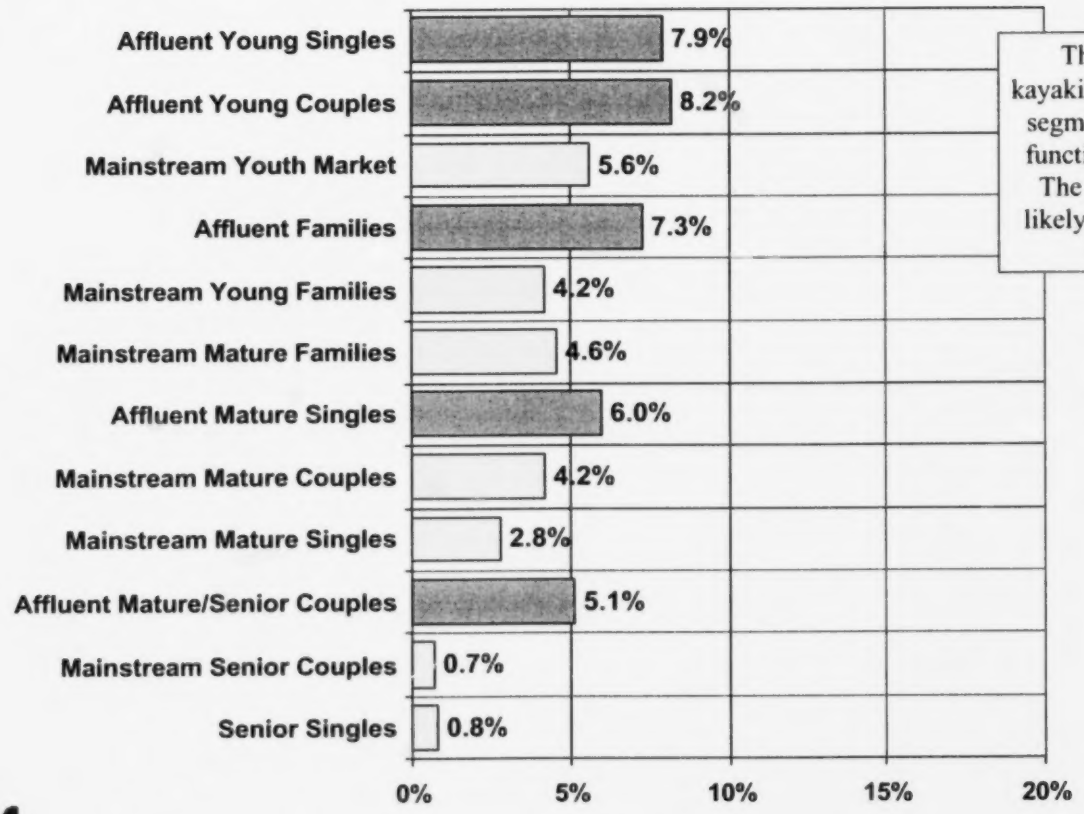


Mainstream Mature Families were the most likely to frequently hunt when not traveling. The Senior Singles, the Affluent Mature Singles, the Mainstream Mature Singles and the Mainstream Senior Couples were the least likely to go hunting frequently.

Percent of Population (18 Plus) Frequently Participating In

Canoeing/Kayaking

By Market Segments: Canada and United States

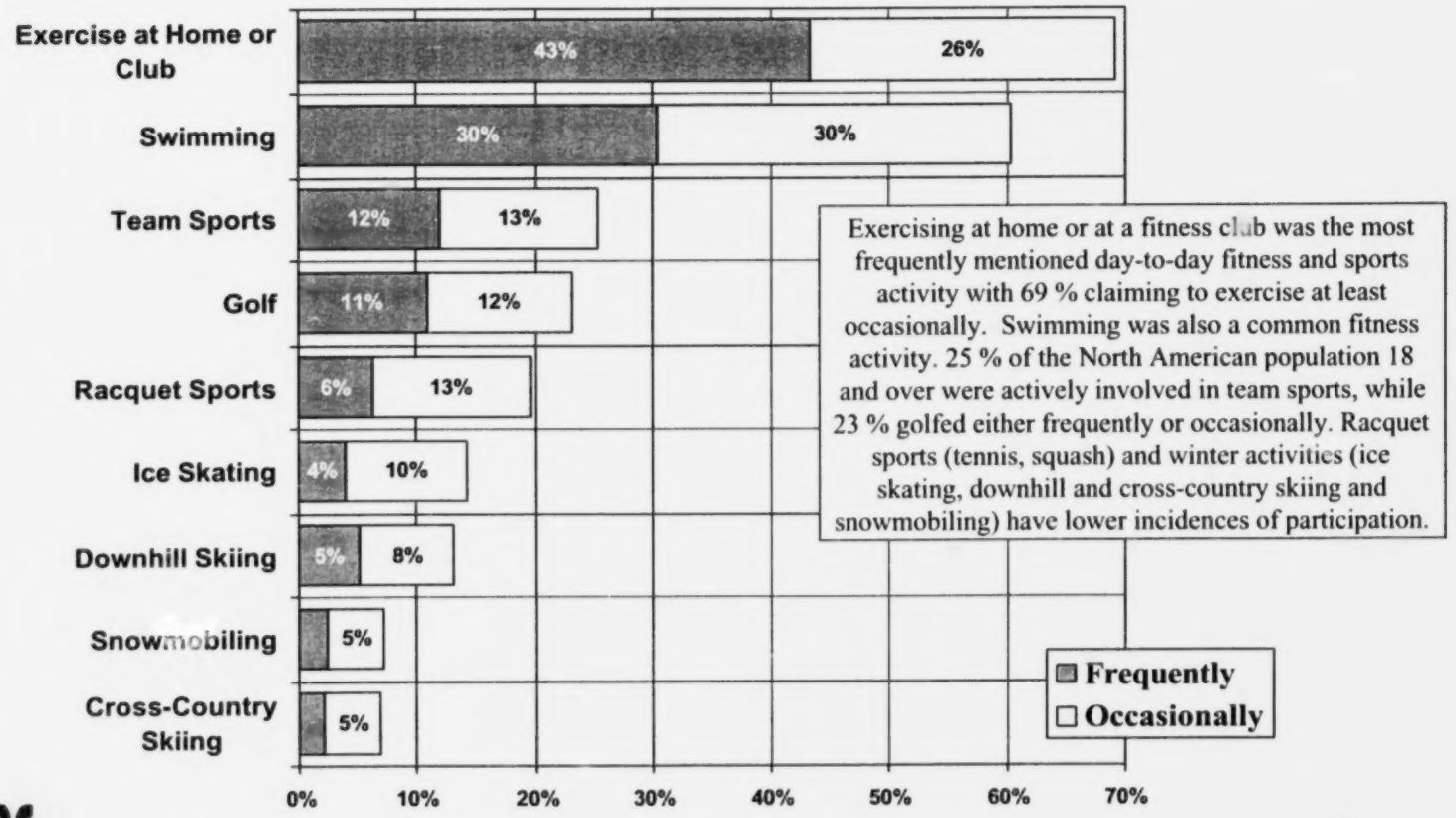


The incidence of canoeing and kayaking was higher within the affluent segments, but generally declined as a function of the age of the respondent. The senior segments were the least likely to canoe or kayak on a frequent basis while not traveling.

Percent of Population (18 Plus)

Active in Day-To-Day Fitness and Sports Activities

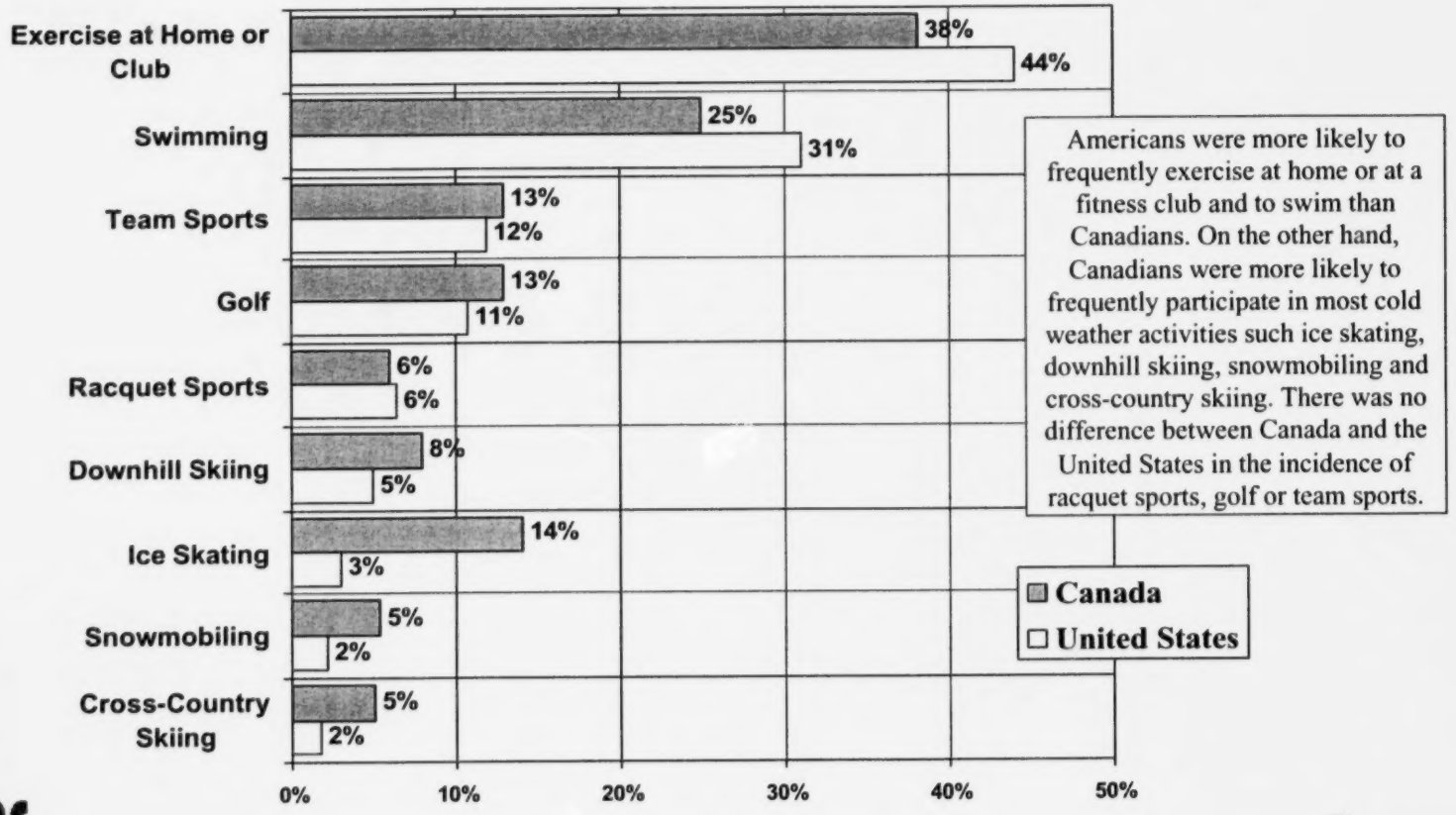
Canada and United States



Percent of Population (18 Plus) Frequently Participating In

Day-to-Day Fitness and Sports Activities

Canada versus United States



Americans were more likely to frequently exercise at home or at a fitness club and to swim than Canadians. On the other hand, Canadians were more likely to frequently participate in most cold weather activities such ice skating, downhill skiing, snowmobiling and cross-country skiing. There was no difference between Canada and the United States in the incidence of racquet sports, golf or team sports.

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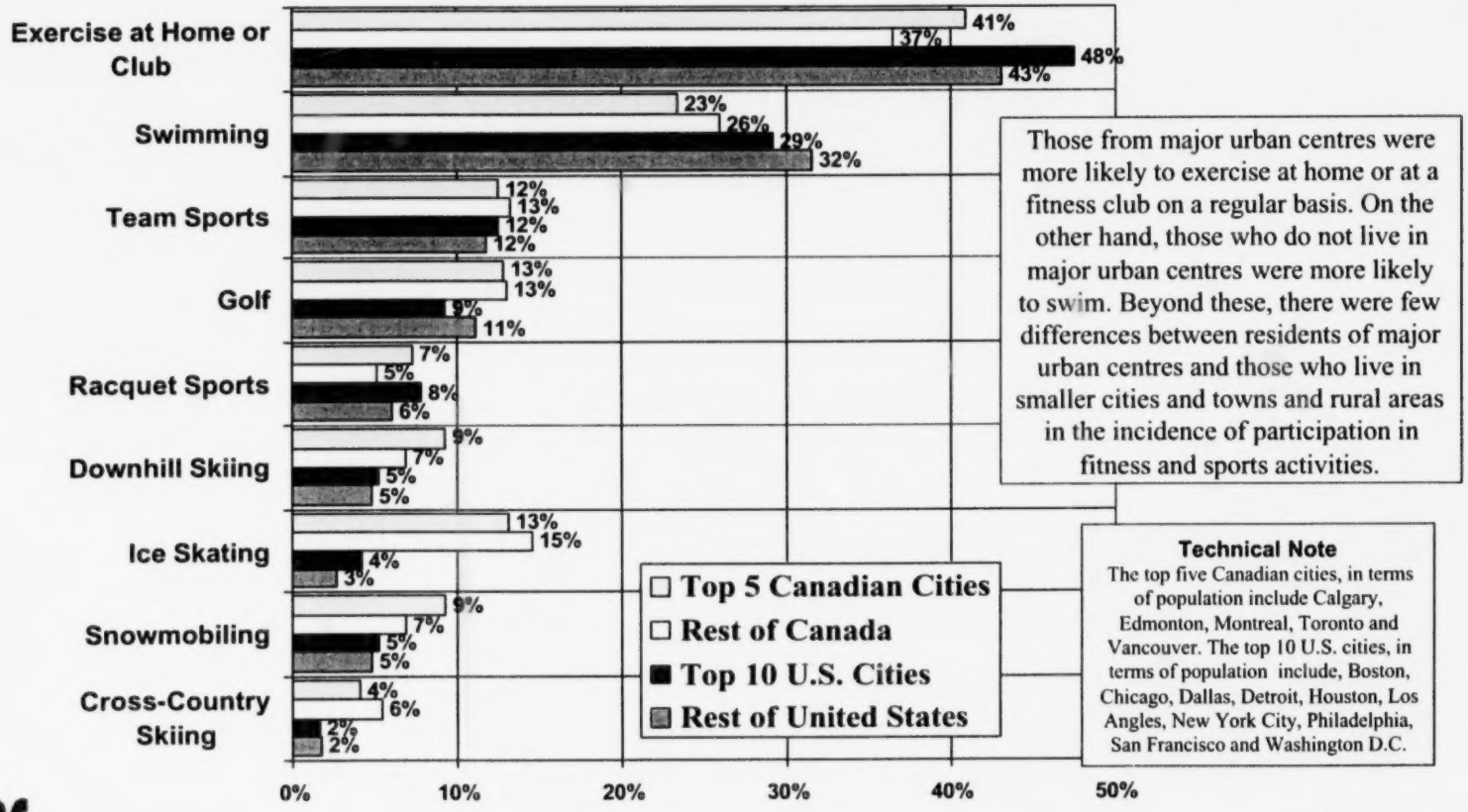
Percent of Population (18 Plus) Frequently Participating In

Day-to-Day Fitness and Sports Activities

Major Urban Centres Versus Rest of Canada/United States



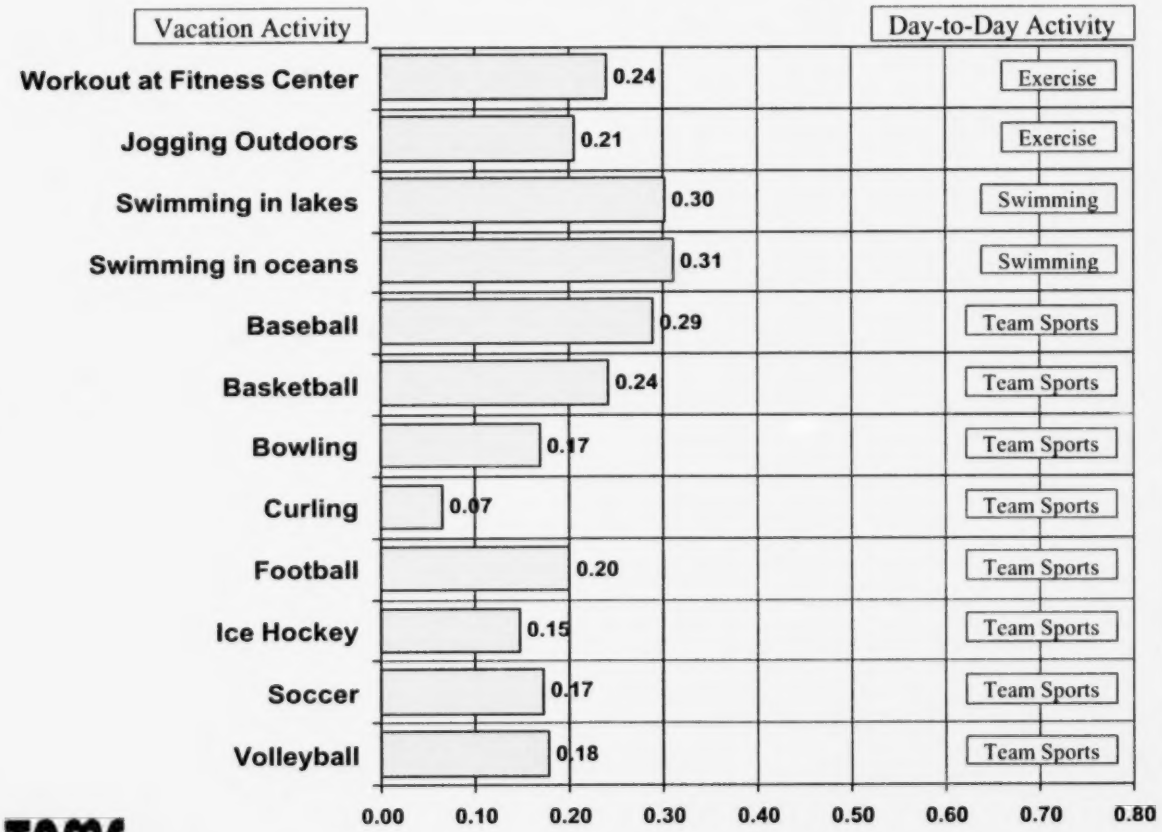
Those from major urban centres were more likely to exercise at home or at a fitness club on a regular basis. On the other hand, those who do not live in major urban centres were more likely to swim. Beyond these, there were few differences between residents of major urban centres and those who live in smaller cities and towns and rural areas in the incidence of participation in fitness and sports activities.

Technical Note

The top five Canadian cities, in terms of population include Calgary, Edmonton, Montreal, Toronto and Vancouver. The top 10 U.S. cities, in terms of population include, Boston, Chicago, Dallas, Detroit, Houston, Los Angles, New York City, Philadelphia, San Francisco and Washington D.C.

Relationship Between the Incidence of Participation in Fitness and Sports Activities When Traveling and When Not Traveling

Association Between Day-To-Day & Comparable Vacation Activities



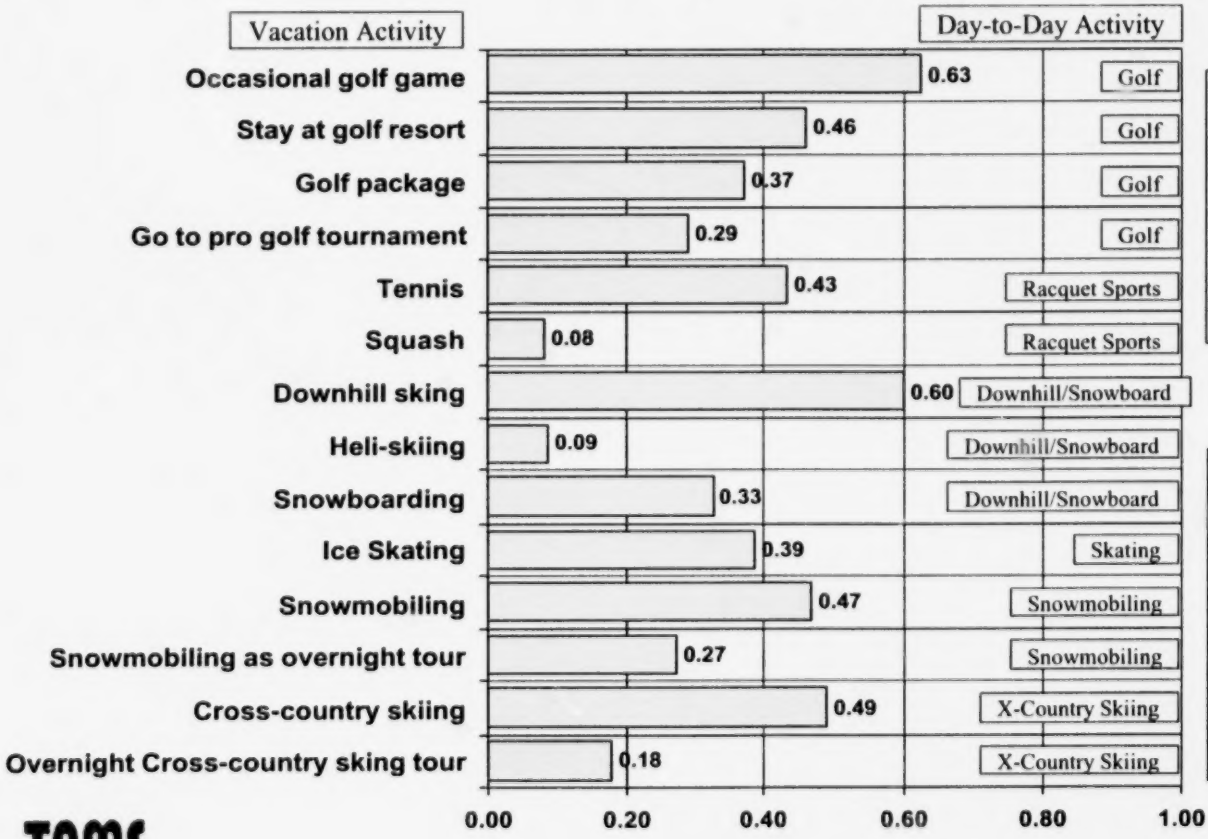
There was a positive, but relatively moderate association between day-to-day fitness activities, swimming, and participation in team sports, and comparable vacation activities.

Technical Note

The association between day-to-day activities and vacation activities is based on the Cramér's V statistic which ranges from 0 to 1. A value of "0" means there is no association while a value of "1" means there is a perfect association. The Cramér's V statistic was derived by cross-tabulating the frequency with which the activity occurs day-to-day (frequently, occasionally, rarely, never) with whether the activity occurred on vacation during the last two years. This analysis is based on the mailback sample.

Relationship Between the Incidence of Participation in Fitness and Sports Activities When Travelling and When Not Travelling

Association Between Day-To-Day & Comparable Vacation Activities



There was a strong association between golfing, tennis, downhill skiing, snowmobiling and cross-country skiing while not on vacation and comparable vacation activities. This association was especially strong for golf and downhill skiing.

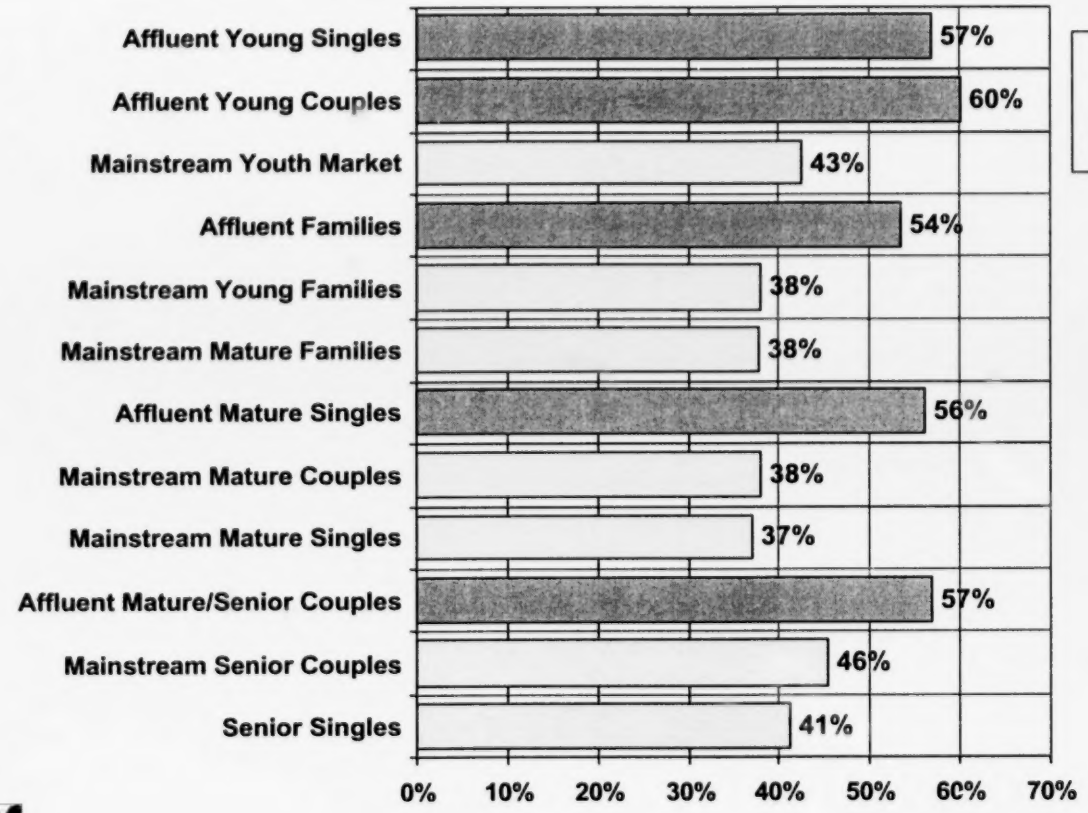
Technical Note

The association between day-to-day activities and vacation activities is based on the Cramér's V statistic which ranges from 0 to 1. A value of "0" means there is no association while a value of "1" means there is a perfect association. The Cramér's V statistic was derived by cross-tabulating the frequency with which the activity occurs day-to-day (frequently, occasionally, rarely, never) with whether the activity occurred on vacation during the last two years. This analysis is based on the mailback sample.

Percent of Population (18 Plus) Frequently Participating In

Exercise at Home or Fitness Club

By Market Segments: Canada and United States

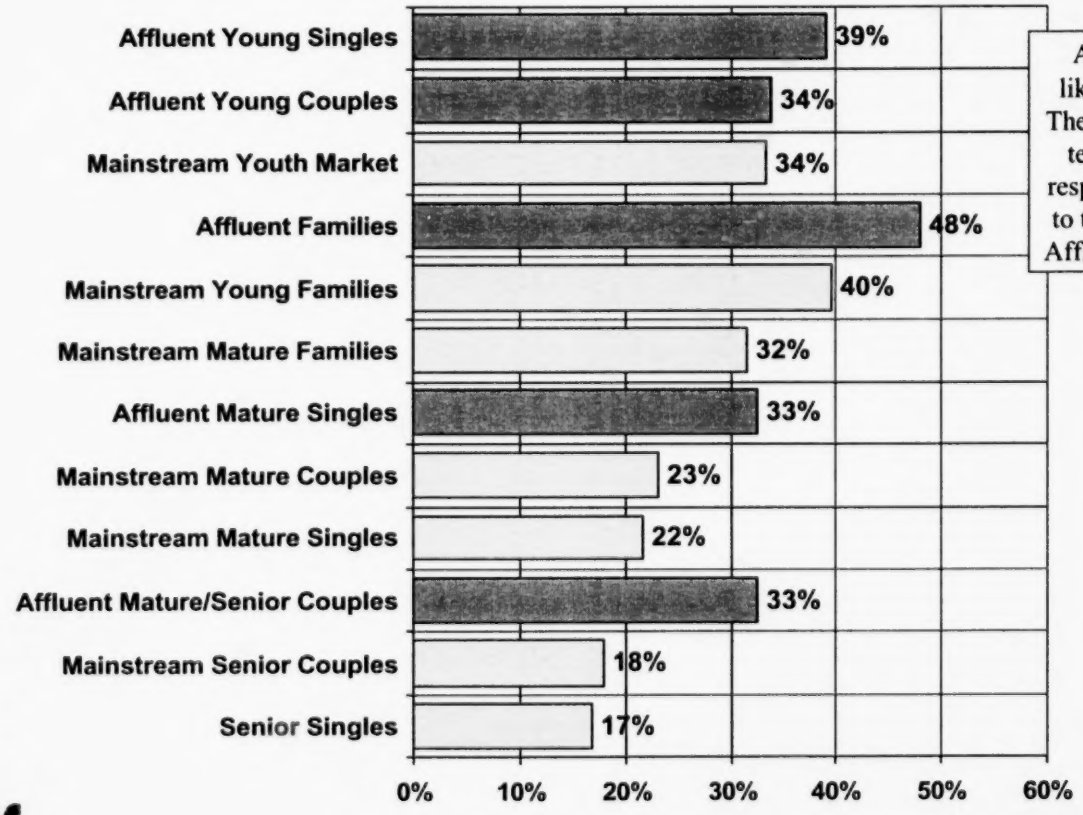


The affluent segments of the market were generally more likely to frequently exercise at home or at a fitness centre.

Percent of Population (18 Plus) Frequently Participating In

Swimming

By Market Segments: Canada and United States

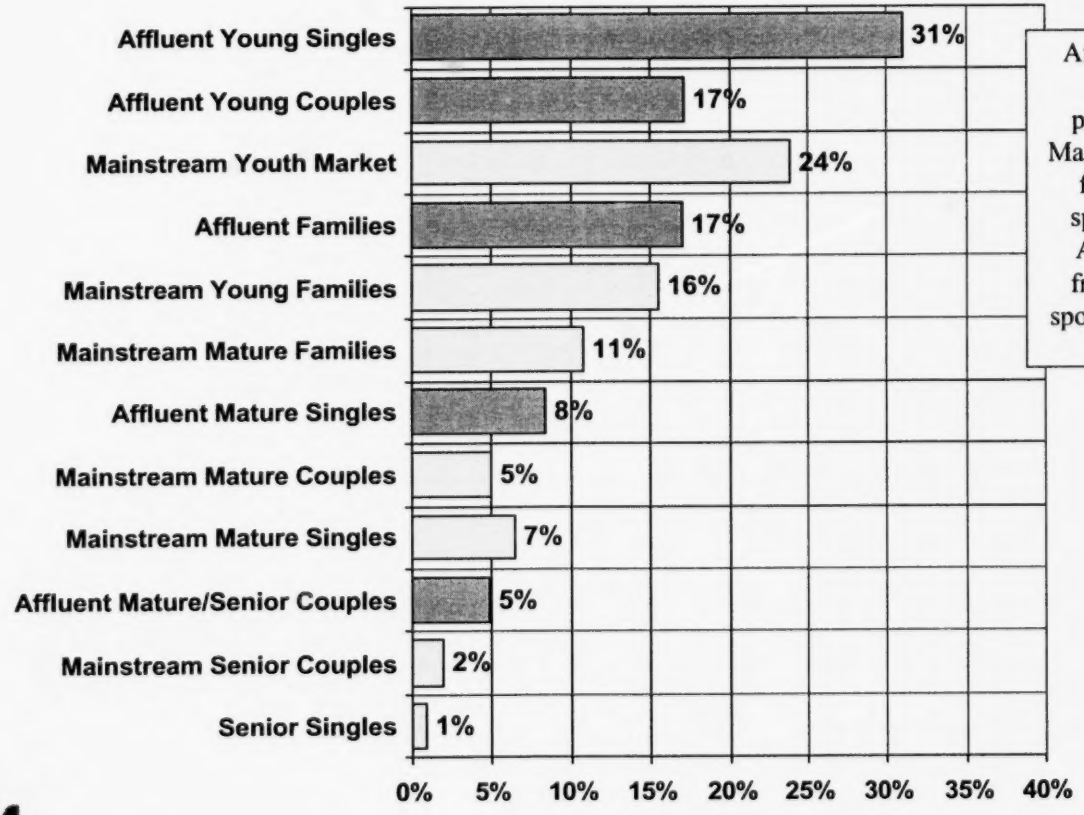


Affluent families were the most likely to swim on a frequent basis. The incidence of frequent swimmers tends to decline as the age of the respondent increases. One exception to this pattern was noted among the Affluent Mature and Senior Couples.

Percent of Population (18 Plus) Frequently Participating In

Team Sports

By Market Segments: Canada and United States

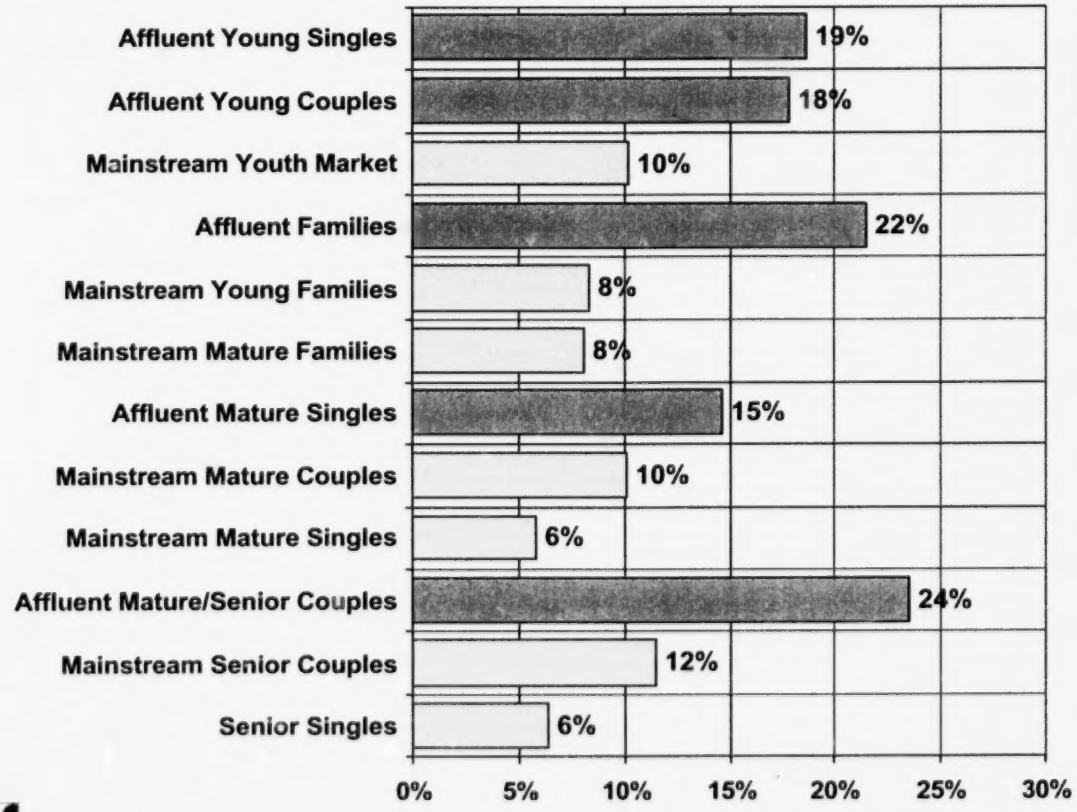


Affluent Young Singles were the most likely to be frequent participants in team sports. The Mainstream Youth Market was also frequently involved with team sports. The percent of the North American population (18 plus) frequently participating in team sports tends to decline as a function of the age of the respondent.

Percent of Population (18 Plus) Frequently Participating In

Golf

By Market Segments: Canada and United States

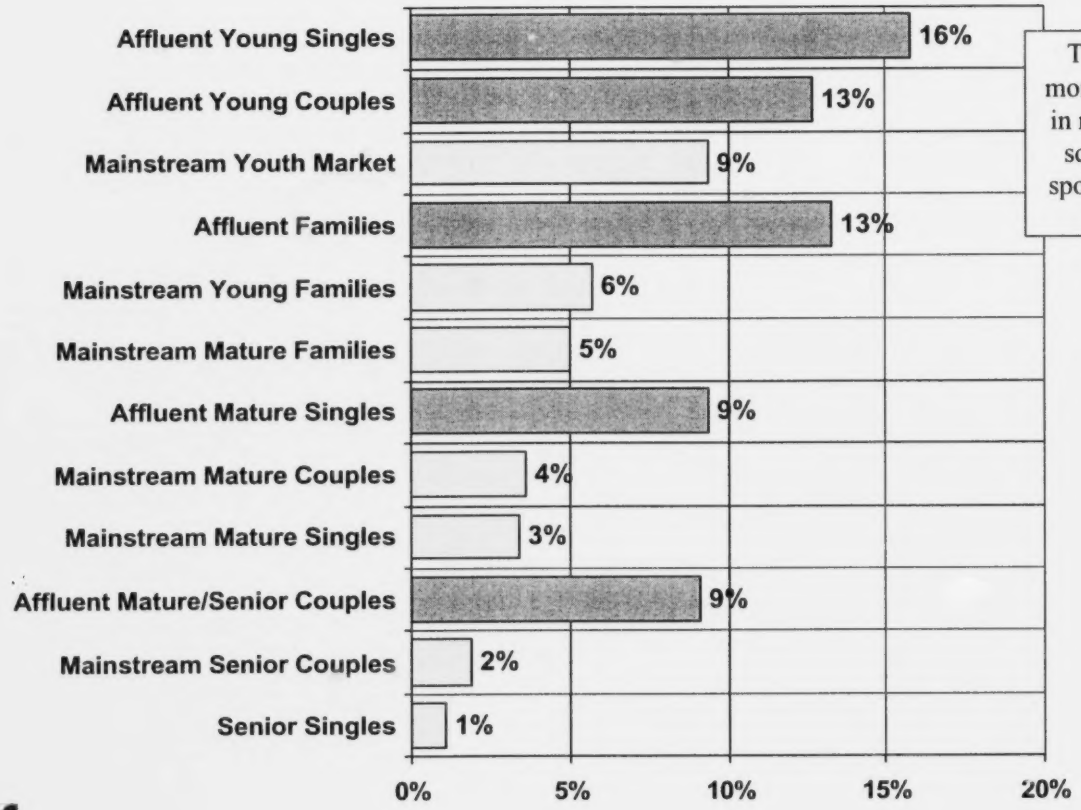


The five affluent segments were clearly more likely to be frequent golfers. Affluent Families and Affluent Mature and Senior Couples were the most avid golfers in the market.

Percent of Population (18 Plus) Frequently Participating In

Racquet Sports (e.g., Tennis)

By Market Segments: Canada and United States



The five affluent segments were more likely to frequently participate in racquet sports such as tennis and squash. The incidence of racquet sports tends to decline as a function of the age of the respondent.

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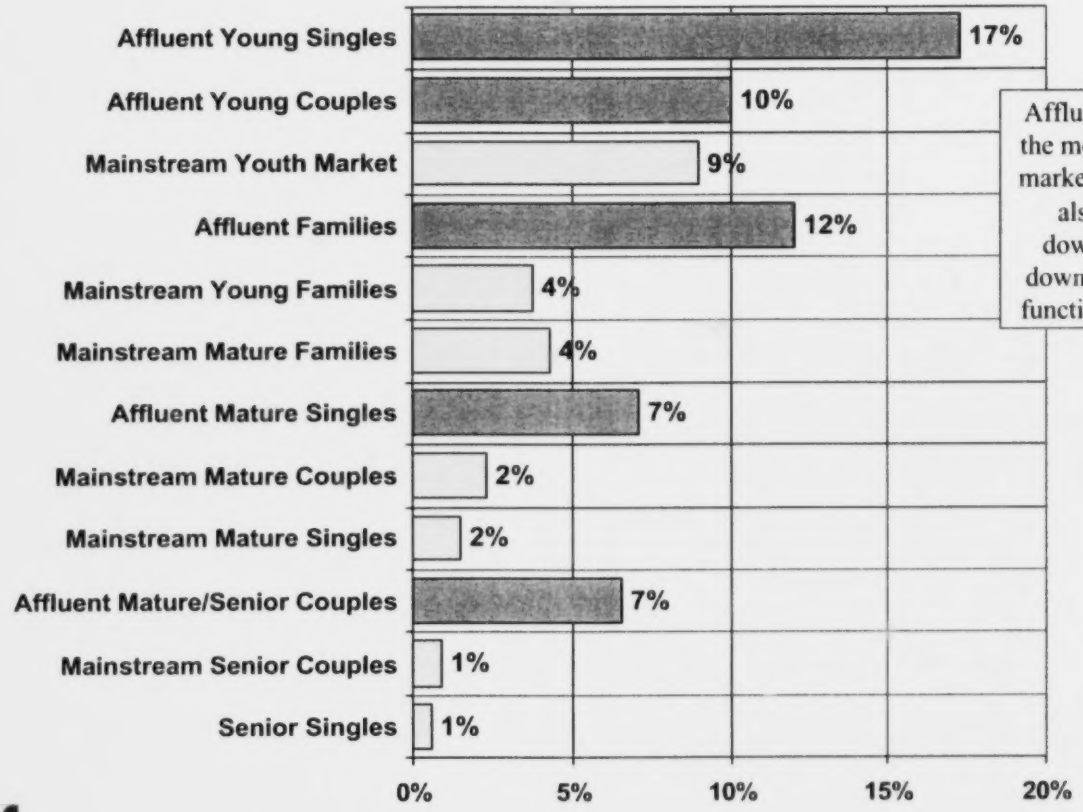
Percent of Population (18 Plus) Frequently Participating In

Downhill Skiing

By Market Segments: Canada and United States

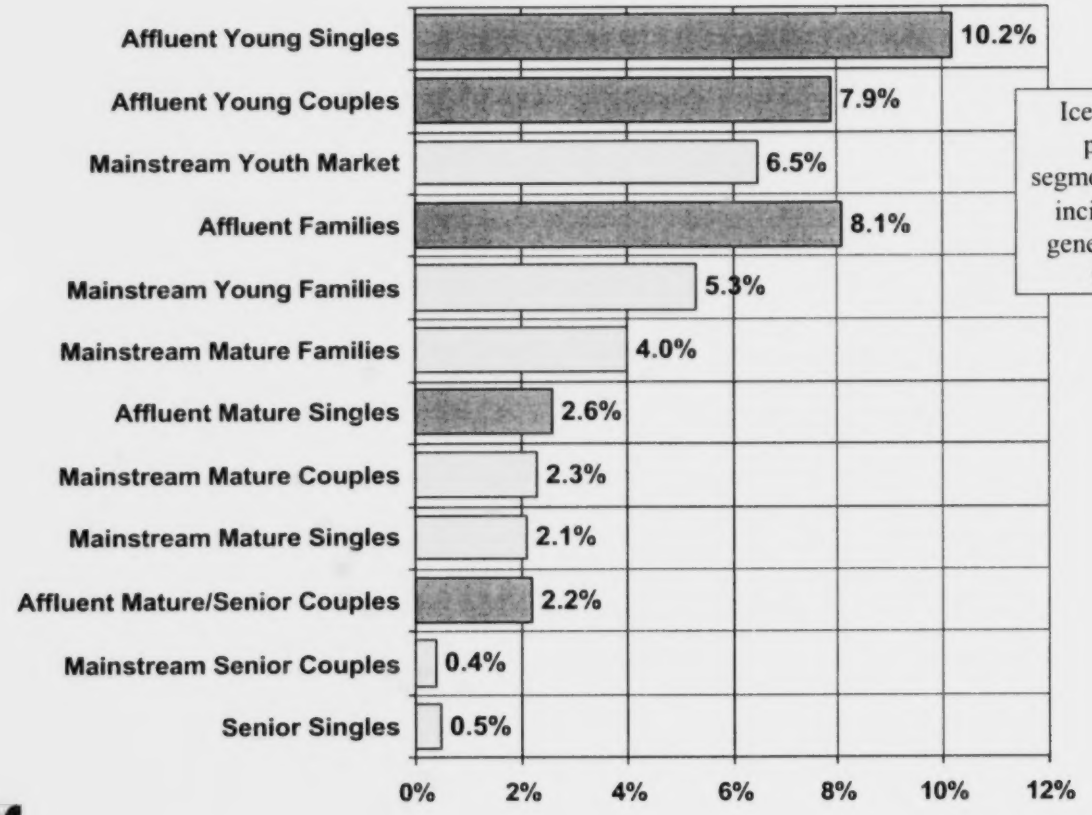


Affluent Young Singles were clearly the most active downhill skiers in the market. Other affluent segments were also more likely to be frequent downhill skiers. The incidence of downhill skiing tends to decline as a function of the age of the respondent.

Percent of Population (18 Plus) Frequently Participating In

Ice Skating

By Market Segments: Canada and United States

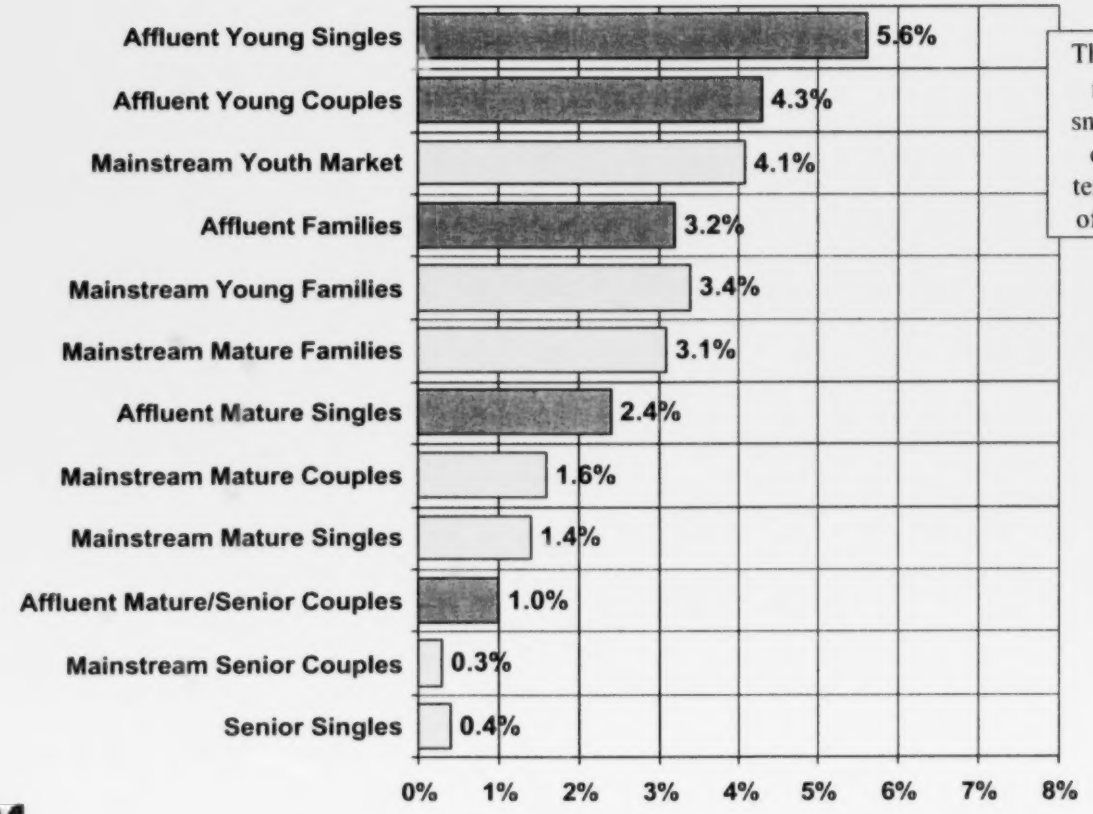


Ice skating was most frequently participated in by the youth segments and Affluent Families. The incidence of frequent ice skating generally declines as a function of the age of the respondent.

Percent of Population (18 Plus) Frequently Participating In

Snowmobiling

By Market Segments: Canada and United States

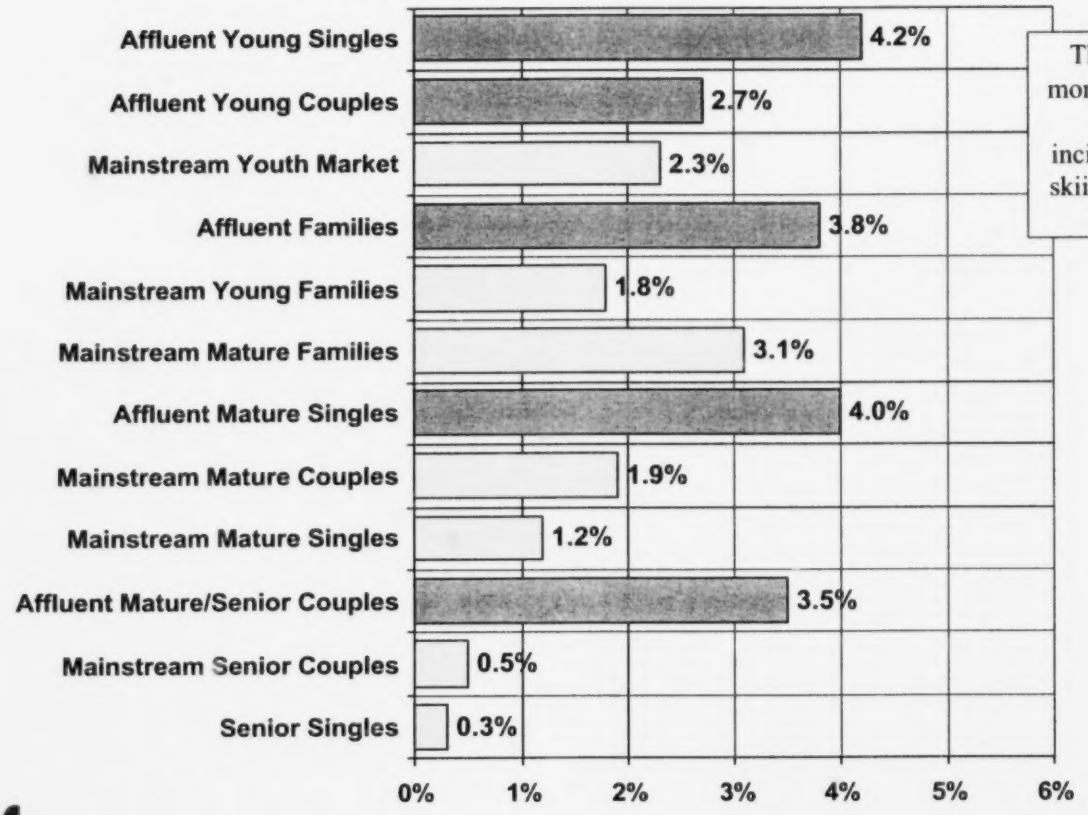


The youth segments were the most likely to be frequent snowmobilers. The incidence of frequent snowmobiling tends to decline as a function of the age of the respondent.

Percent of Population (18 Plus) Frequently Participating In

Cross-Country Skiing

By Market Segments: Canada and United States

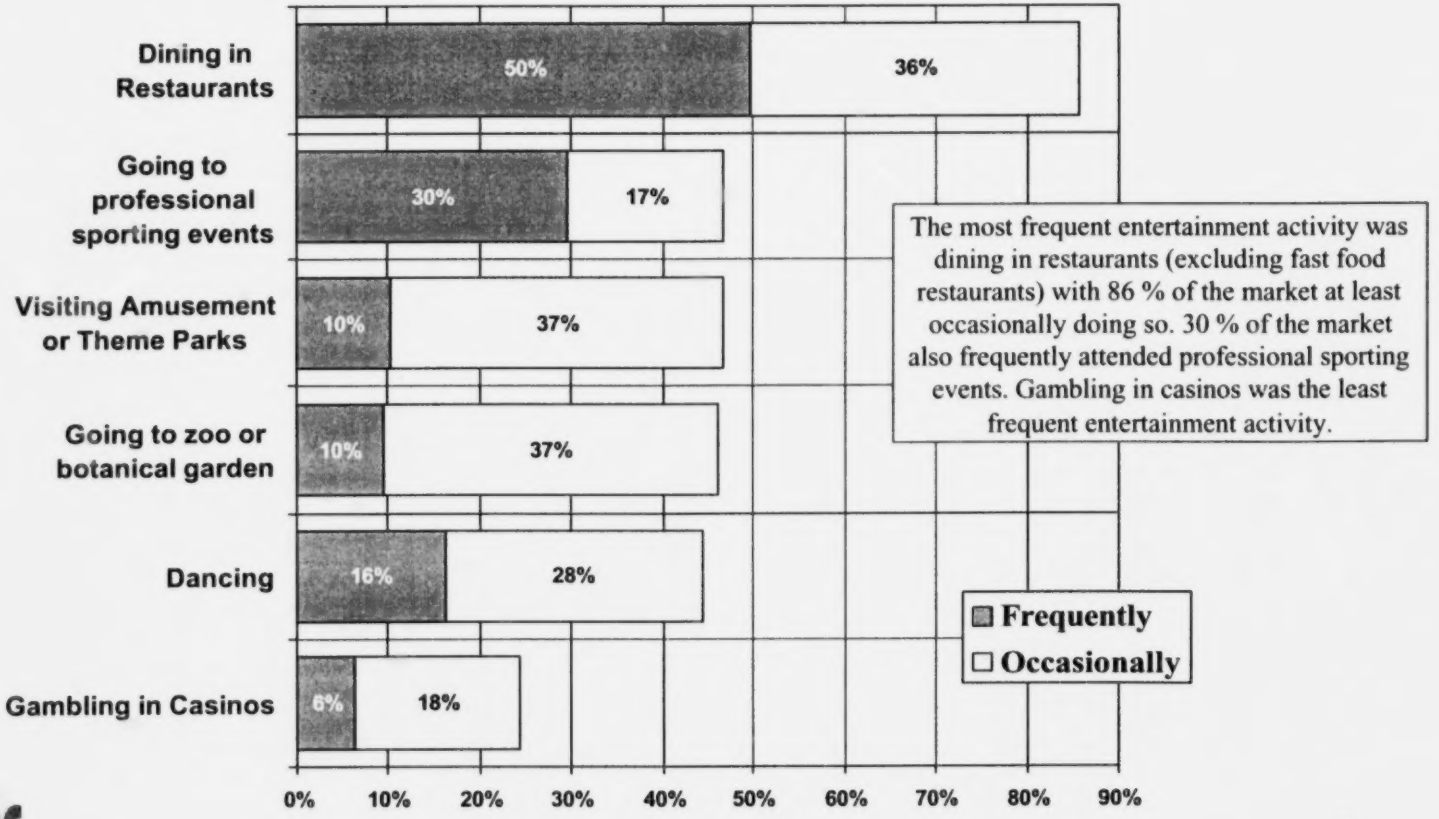


The five affluent segments were more likely to frequently participate in cross-country skiing. The incidence of frequent cross-country skiing tends to decline as a function of the age of the respondent.

Percent of Population (18 Plus) Active In

Day-To-Day Entertainment Activities

Canada and United States



The most frequent entertainment activity was dining in restaurants (excluding fast food restaurants) with 86 % of the market at least occasionally doing so. 30 % of the market also frequently attended professional sporting events. Gambling in casinos was the least frequent entertainment activity.

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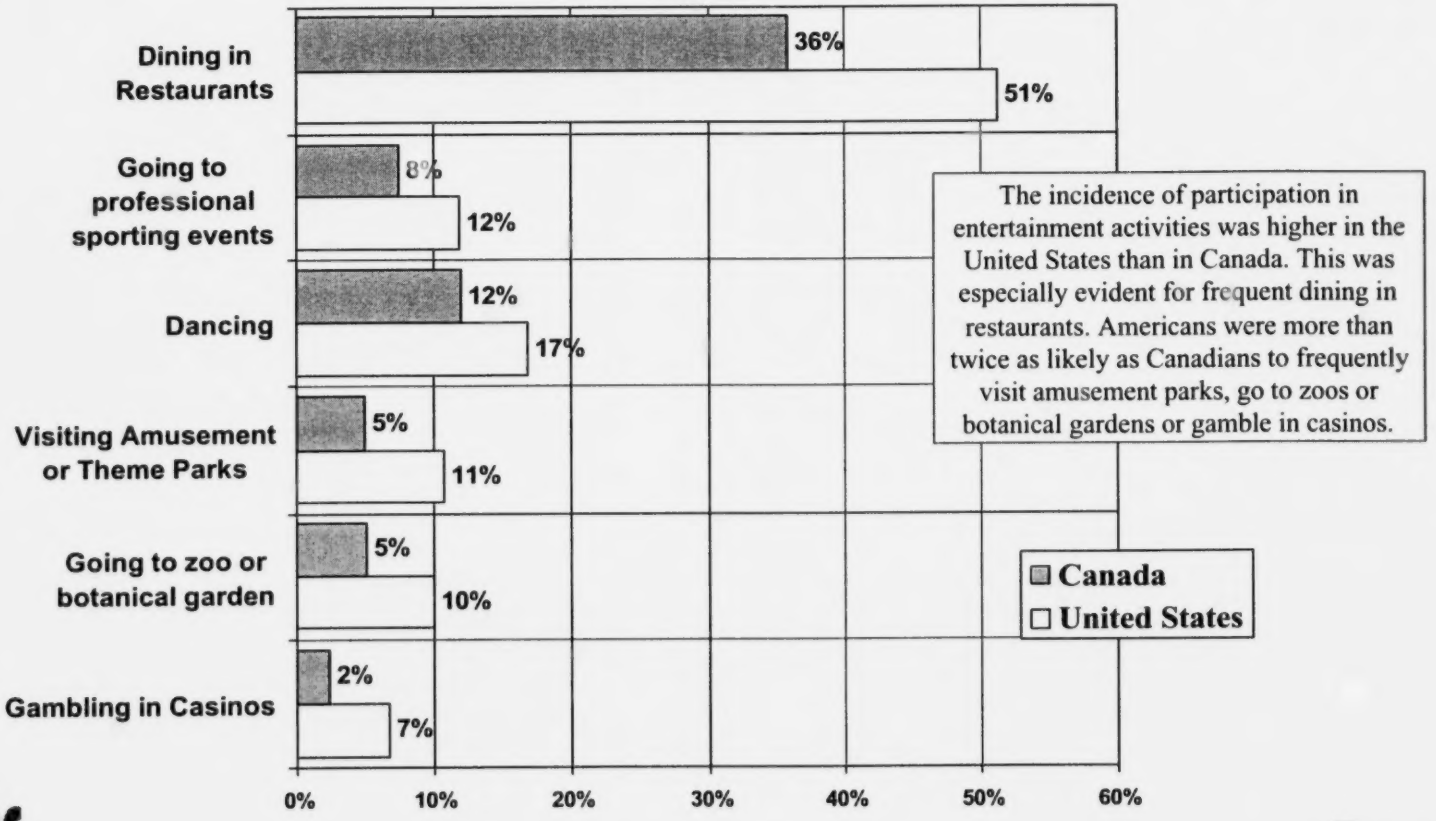
Percent of Population (18 Plus) Frequently Participating In

Day-To-Day Entertainment Activities

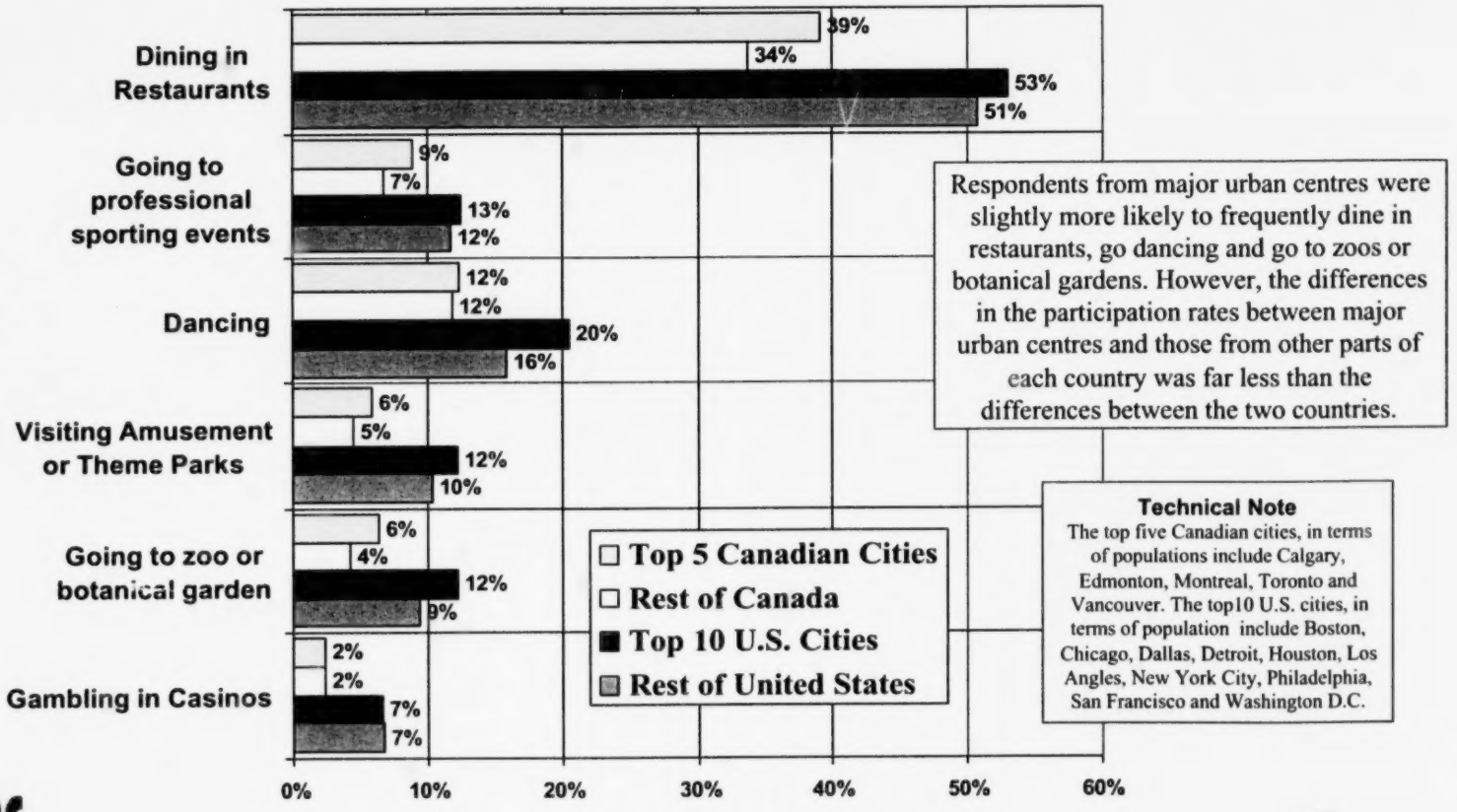
Canada versus United States



Percent of Population (18 Plus) Frequently Participating In

Day-To-Day Entertainment Activities

Major Urban Centres Versus Rest of Canada/United States



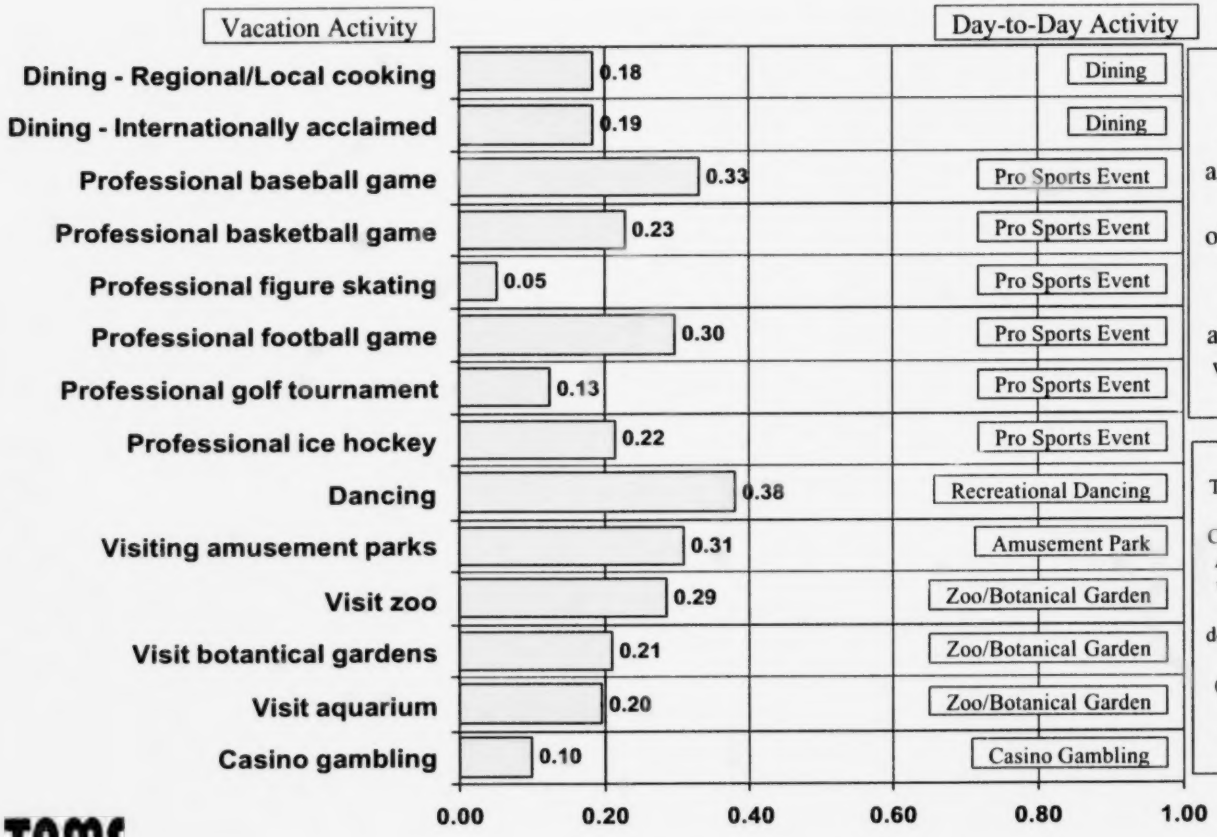
Respondents from major urban centres were slightly more likely to frequently dine in restaurants, go dancing and go to zoos or botanical gardens. However, the differences in the participation rates between major urban centres and those from other parts of each country was far less than the differences between the two countries.

Technical Note

The top five Canadian cities, in terms of populations include Calgary, Edmonton, Montreal, Toronto and Vancouver. The top10 U.S. cities, in terms of population include Boston, Chicago, Dallas, Detroit, Houston, Los Angles, New York City, Philadelphia, San Francisco and Washington D.C.

Relationship Between the Incidence of Participation in Entertainment Activities When Traveling and When Not Traveling

Association Between Day-To-Day & Comparable Vacation Activities



The association between participation in entertainment activities while not on vacation and comparable activities while on vacation was weaker than that observed for outdoor activities and sports activities. This indicates that day-to-day entertainment activities were not as predictive of whether such activities will occur while on vacation.

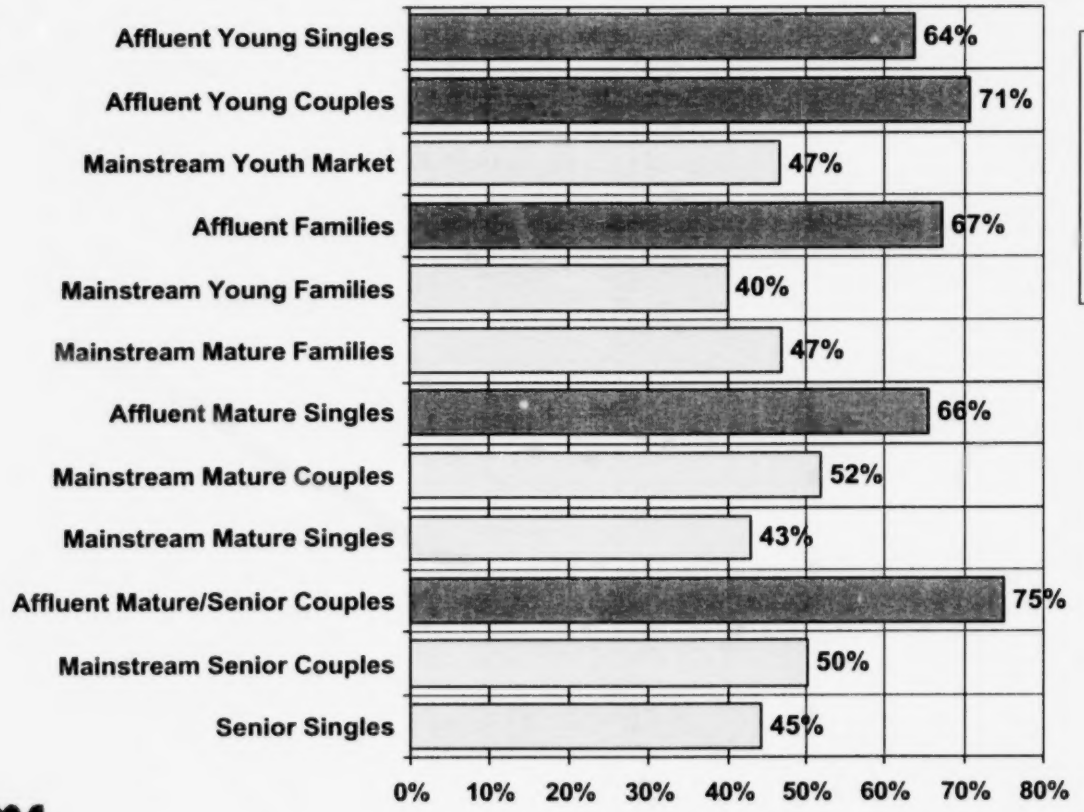
Technical Note

The association between day-to-day activities and vacation activities is based on the Cramér's V statistic which ranges from 0 to 1. A value of "0" means there is no association while a value of "1" means there is a perfect association. The Cramér's V statistic was derived by cross-tabulating the frequency with which the activity occurs day-to-day (frequently, occasionally, rarely, never) with whether the activity occurred on vacation during the last two years. This analysis is based on the mailback sample.

Percent of Population (18 Plus) Frequently

Dining in Restaurants (Excluding Fast Food)

By Market Segments: Canada and United States

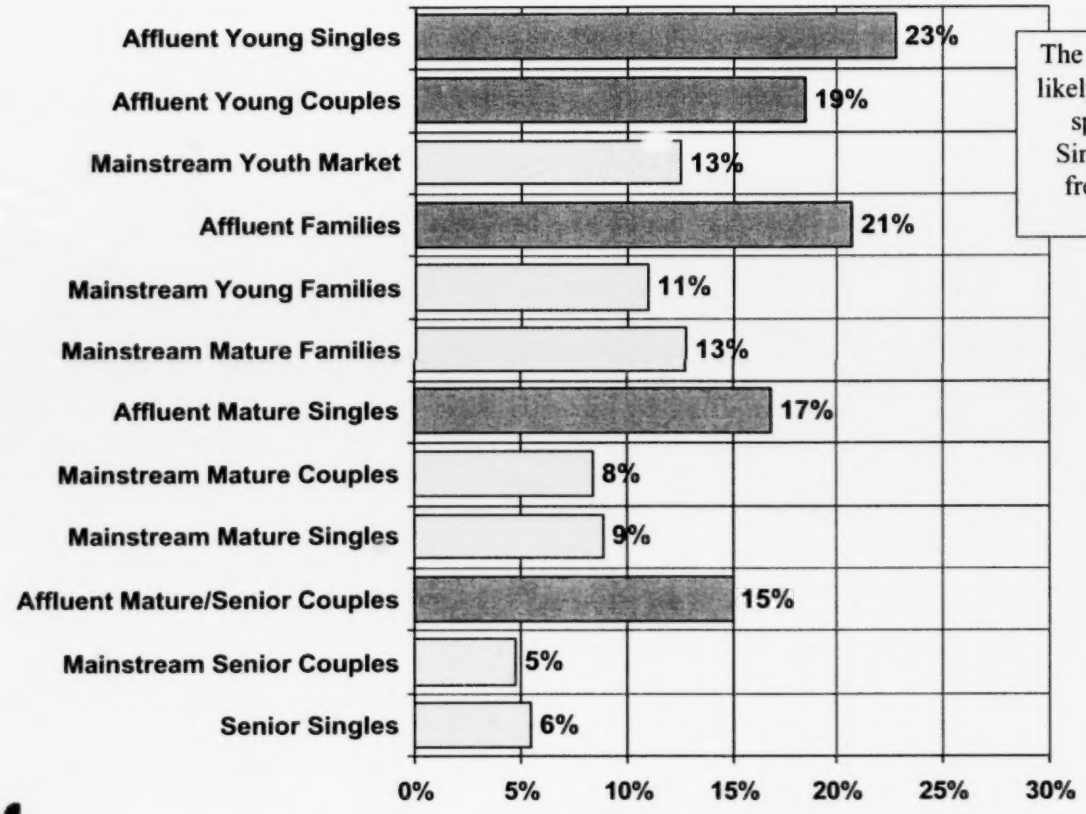


The five affluent segments, and especially Affluent Young Couples and Affluent Mature and Senior Couples, were more likely to frequently dine in restaurants. Mainstream Young Families were the least likely to frequently dine in restaurants.

Percent of Population (18 Plus) Frequently

Attending Professional Sports Event

By Market Segments: Canada and United States



The five affluent segments were more likely to frequently attend professional sporting events. Affluent Young Singles were especially likely to be frequent attendees of professional sporting events.

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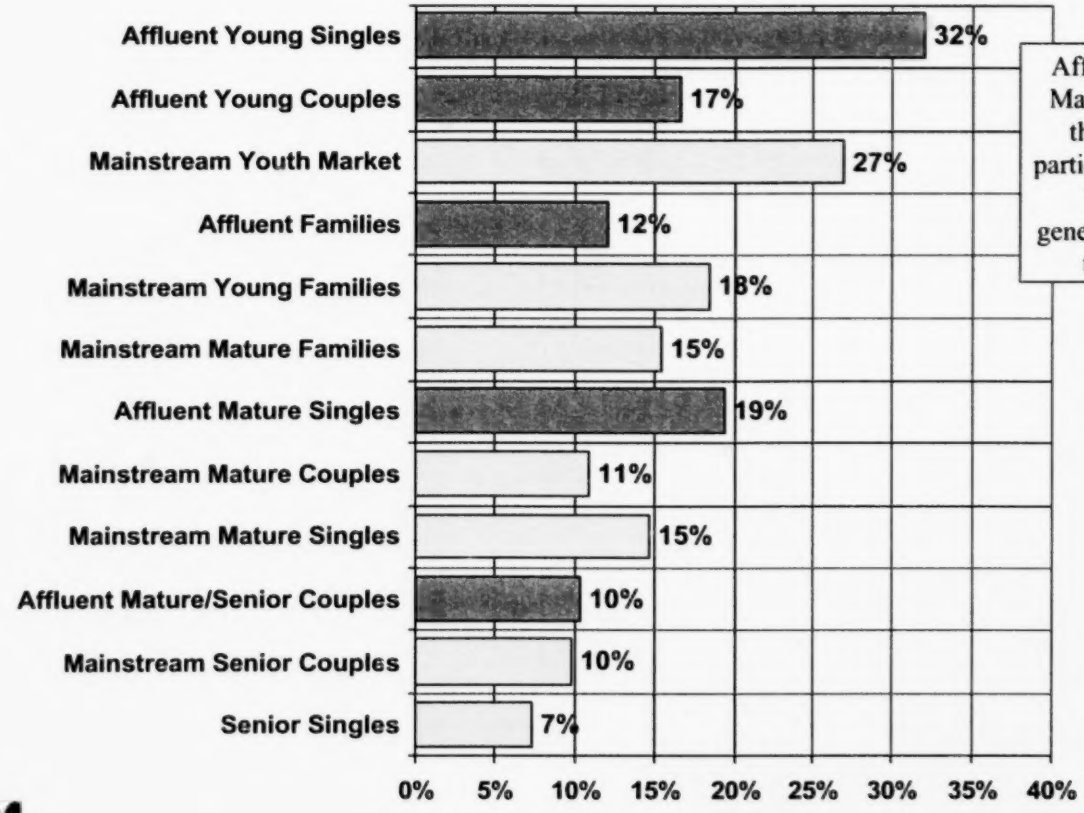
Percent of Population (18 Plus) Frequently Participating In

Recreational Dancing

By Market Segments: Canada and United States

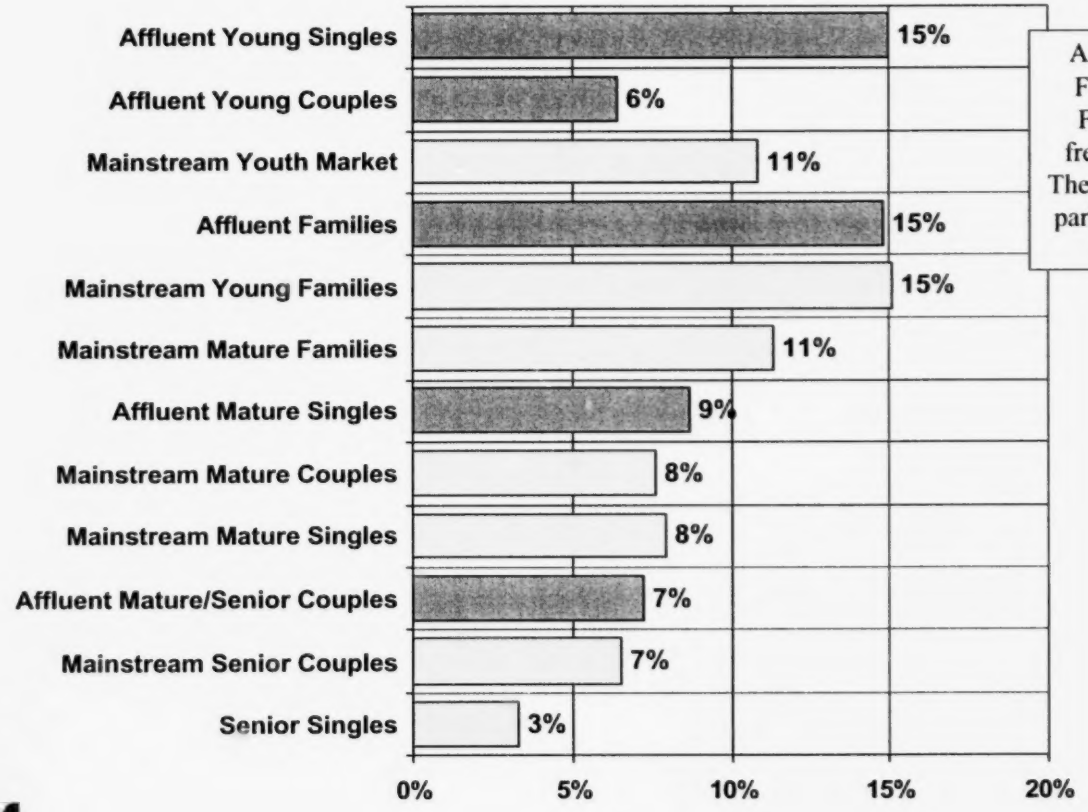


Affluent Young Singles and the Mainstream Youth Market were the most likely to frequently participate in recreational dancing. The incidence of dancing generally declines as a function of the age of the respondent.

Percent of Population (18 Plus) Frequently

Going To Amusement or Theme Park

By Market Segments: Canada and United States



Affluent Young Singles, Affluent Families and Mainstream Young Families were the most likely to frequently go to amusement parks. The incidence of going to amusement parks tends to decrease as a function of the age of the respondent.

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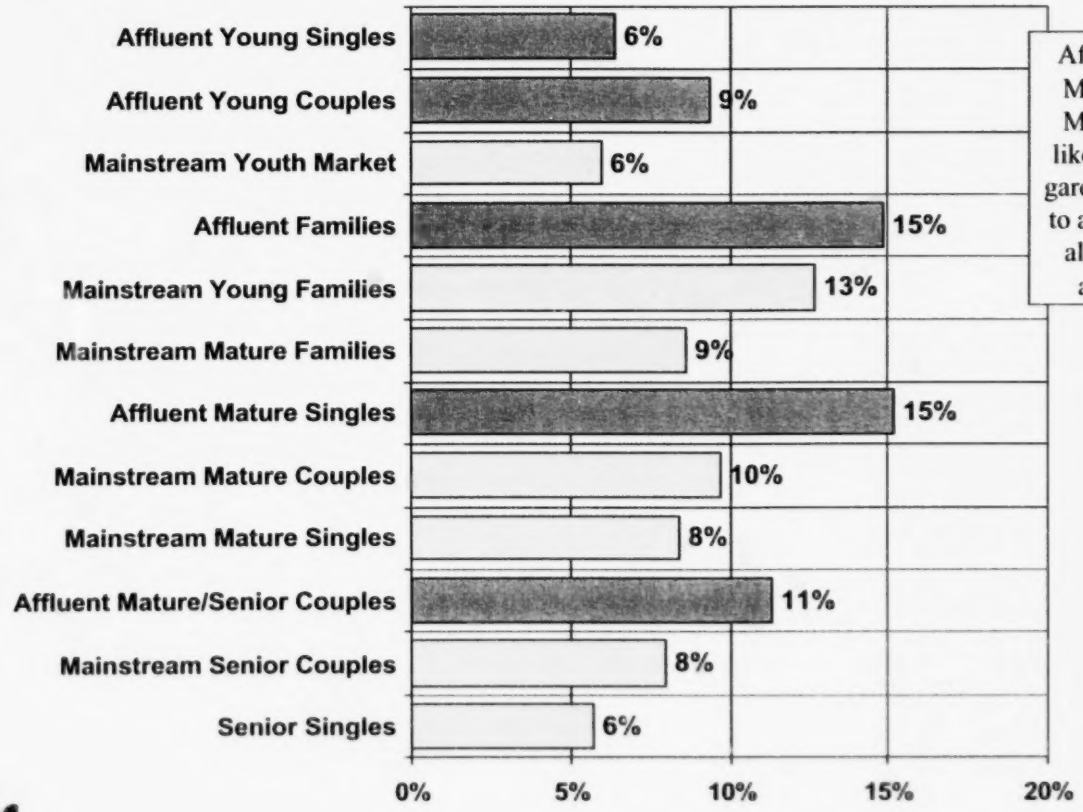
Percent of Population (18 Plus) Frequently

Going To Zoo or Botanical Garden

By Market Segments: Canada and United States

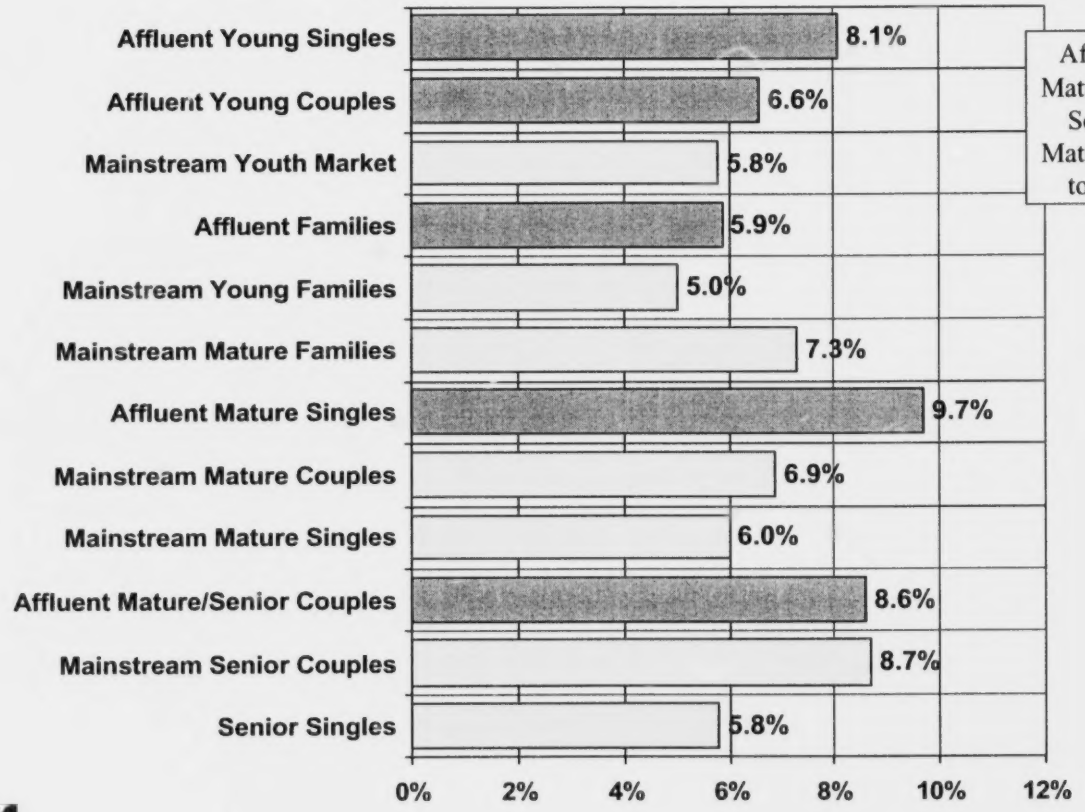


Affluent Families, Mainstream Mature Families and Affluent Mature Singles were the most likely to go to zoos or botanical gardens on a regular basis. Going to a zoo or botanical garden was also moderately related to the affluence of the household.

Percent of Population (18 Plus) Frequently

Gambling in a Casino

By Market Segments: Canada and United States

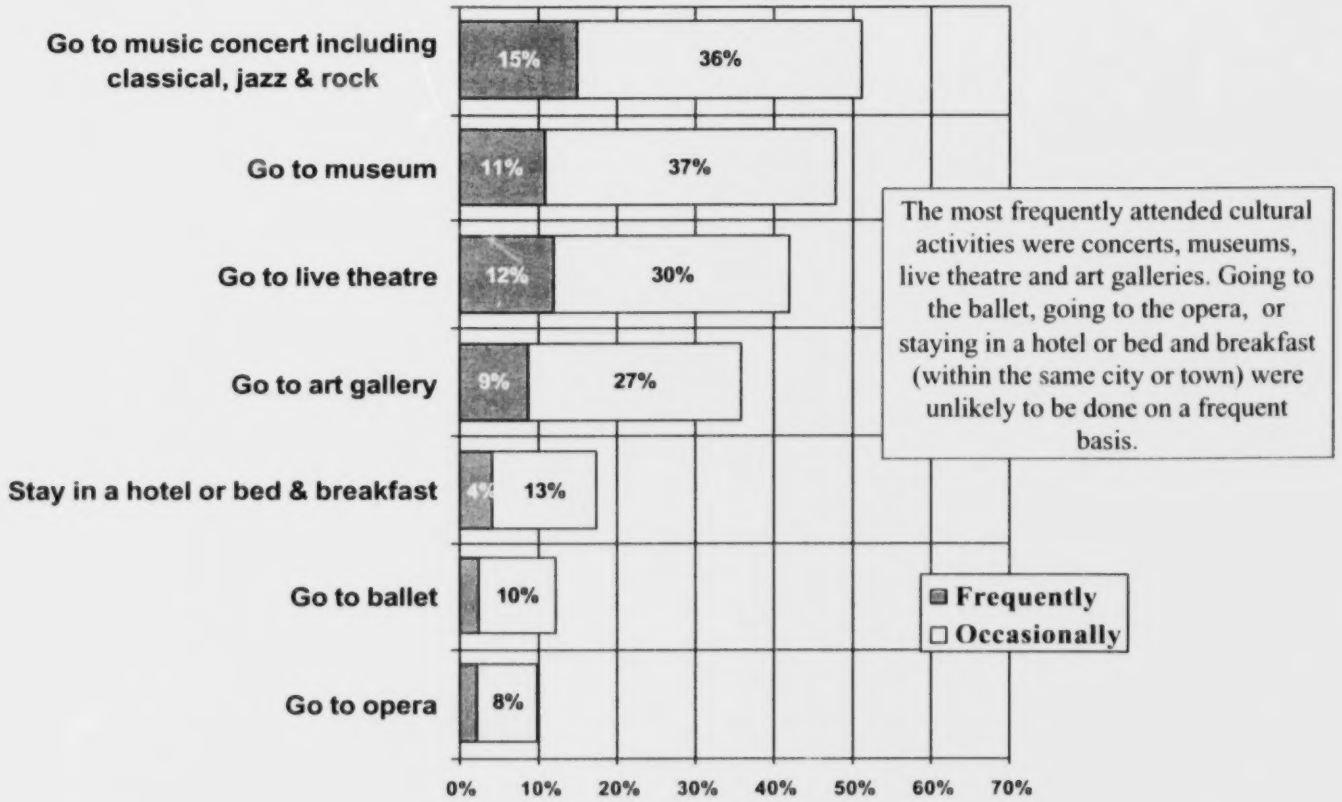


Affluent Young Singles, Affluent Mature Singles, Affluent Mature and Senior Couples and Mainstream Mature Couples were the most likely to frequently gamble in casinos.

Percent of Population (18 Plus)

Attending Day-To-Day Cultural Activities

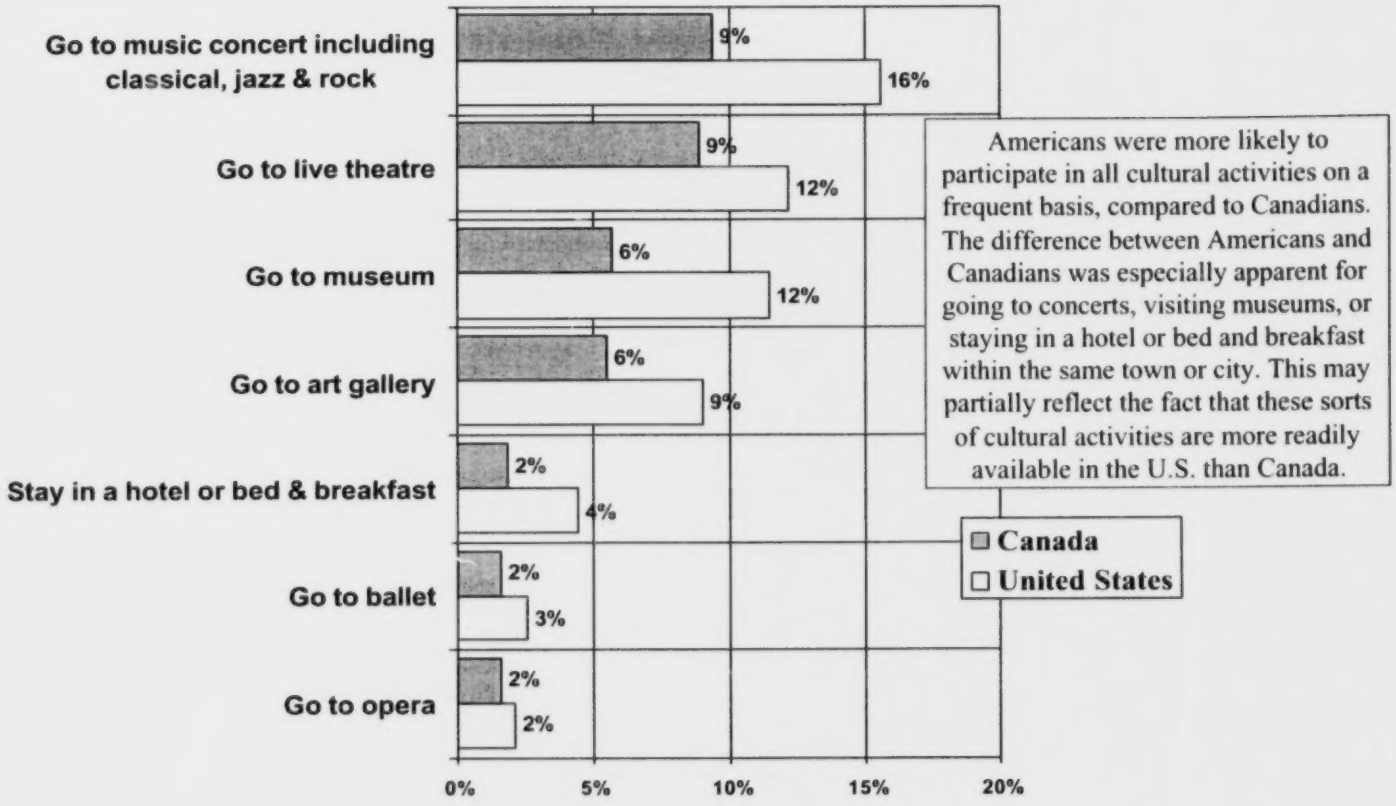
Canada and United States



Percent of Population (18 Plus) Frequently Going To

Cultural Activities

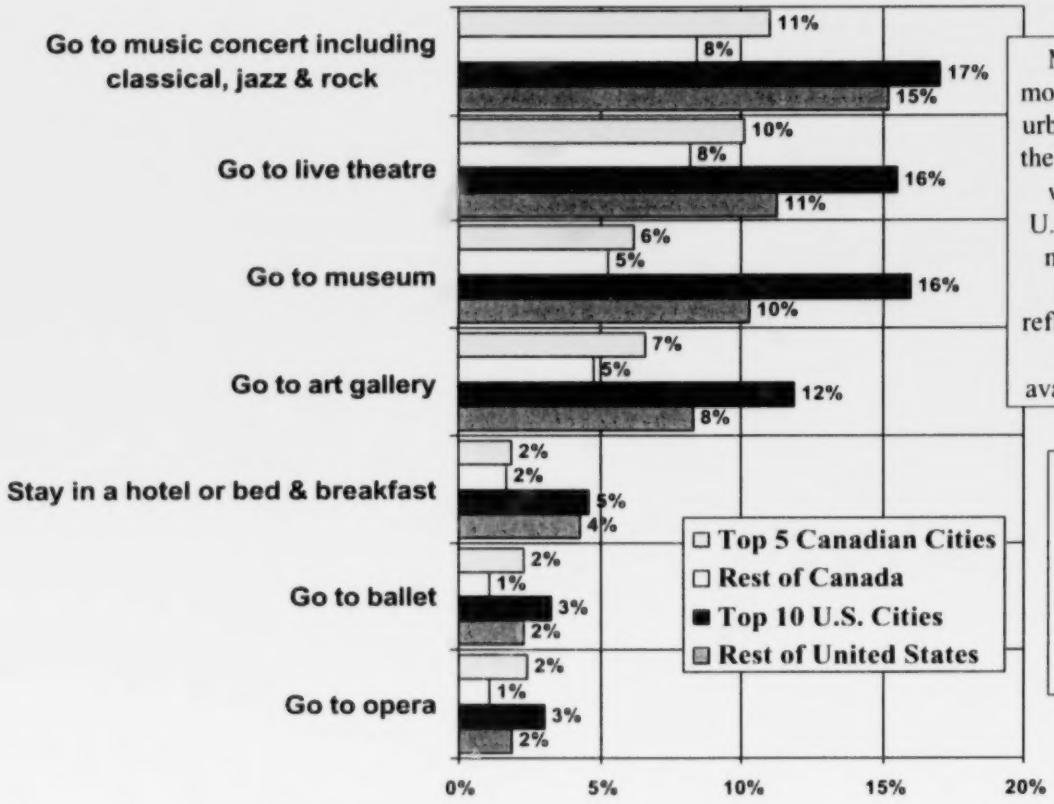
Canada versus United States



Percent of Population (18 Plus) Frequently Active In

Cultural Activities

Major Urban Centres Versus Rest of Canada/United States

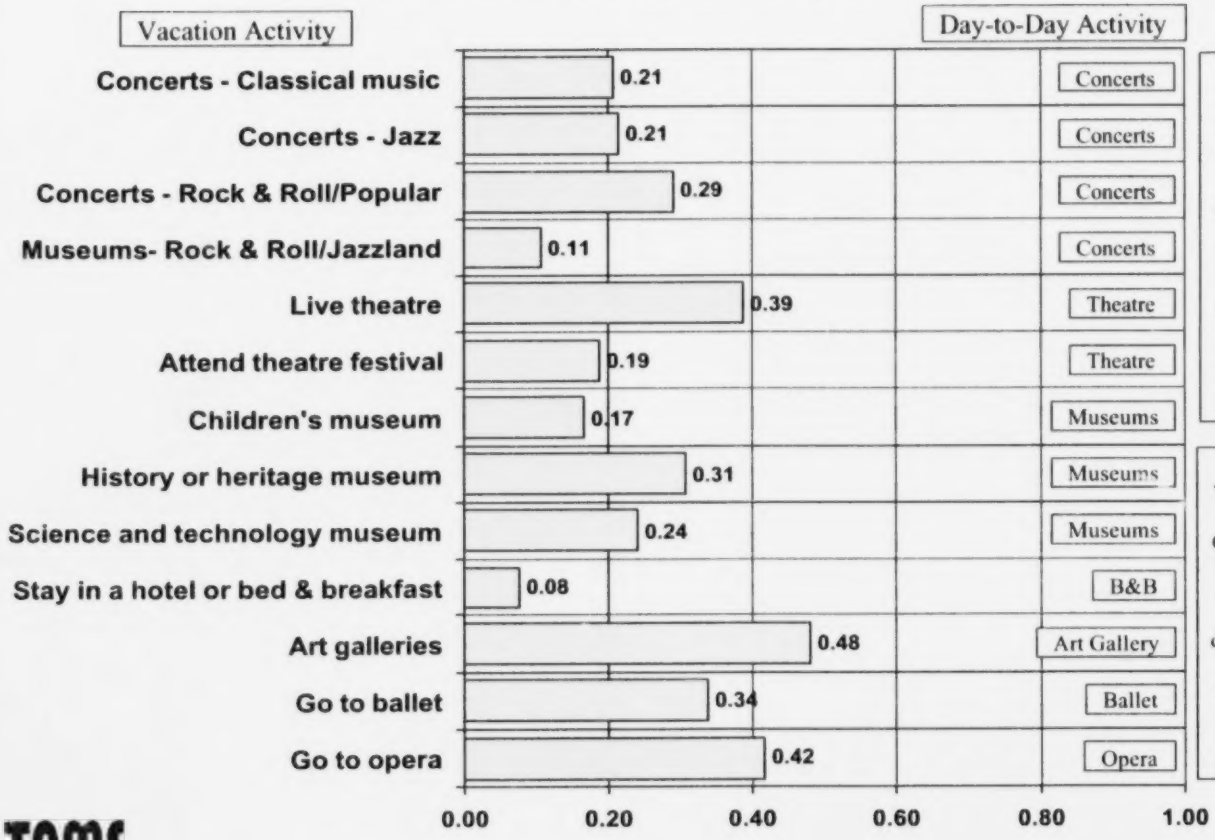


Most cultural activities were more frequently pursued in major urban centres in both Canada and the United States. This difference was especially evident in the U.S. for live theatre and visiting museums and art galleries. In part, these differences may reflect the fact that many cultural activities are more readily available in larger urban centres.

Technical Note

The top five Canadian cities, in terms of populations include Calgary, Edmonton, Montreal, Toronto and Vancouver. The top 10 U.S. cities, in terms of population include Boston, Chicago, Dallas, Detroit, Houston, Los Angles, New York City, Philadelphia, San Francisco and Washington D.C.

Relationship Between the Incidence of Participation in Cultural Activities When Traveling and When Not Traveling
Association Between Day-To-Day & Comparable Vacation Activities



The association between participation in various cultural activities while not on vacation and comparable activities while on vacation was weaker than that observed for outdoor activities, fitness and sports activities. The association was strongest for the high arts, such as visiting art galleries or going to live theatre, the ballet or the opera.

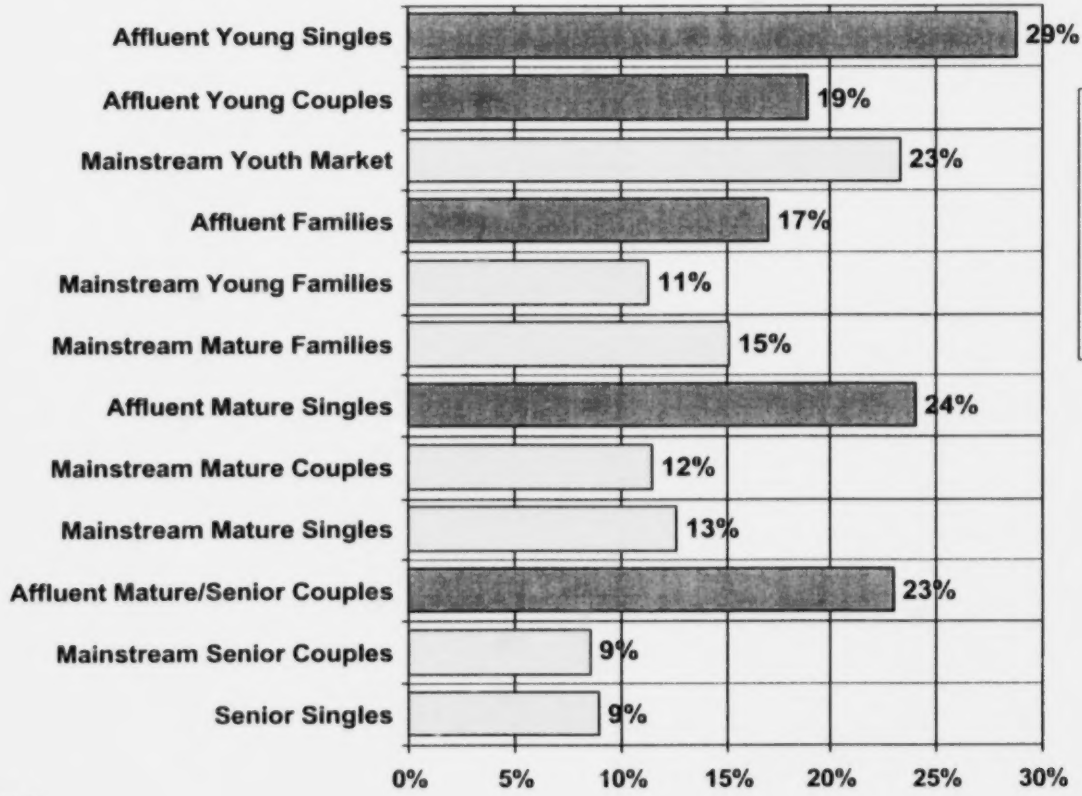
Technical Note

The association between day-to-day activities and vacation activities is based on the Cramér's V statistic which ranges from 0 to 1. A value of "0" means there is no association while a value of "1" means there is a perfect association. The Cramér's V statistic was derived by cross-tabulating the frequency with which the activity occurs day-to-day (frequently, occasionally, rarely, never) with whether the activity occurred on vacation during the last two years. This analysis is based on the mailback sample.

Percent of Population (18 Plus) Frequently Attending

Musical Concerts (Including Classical, Jazz & Rock)

By Market Segments: Canada and United States

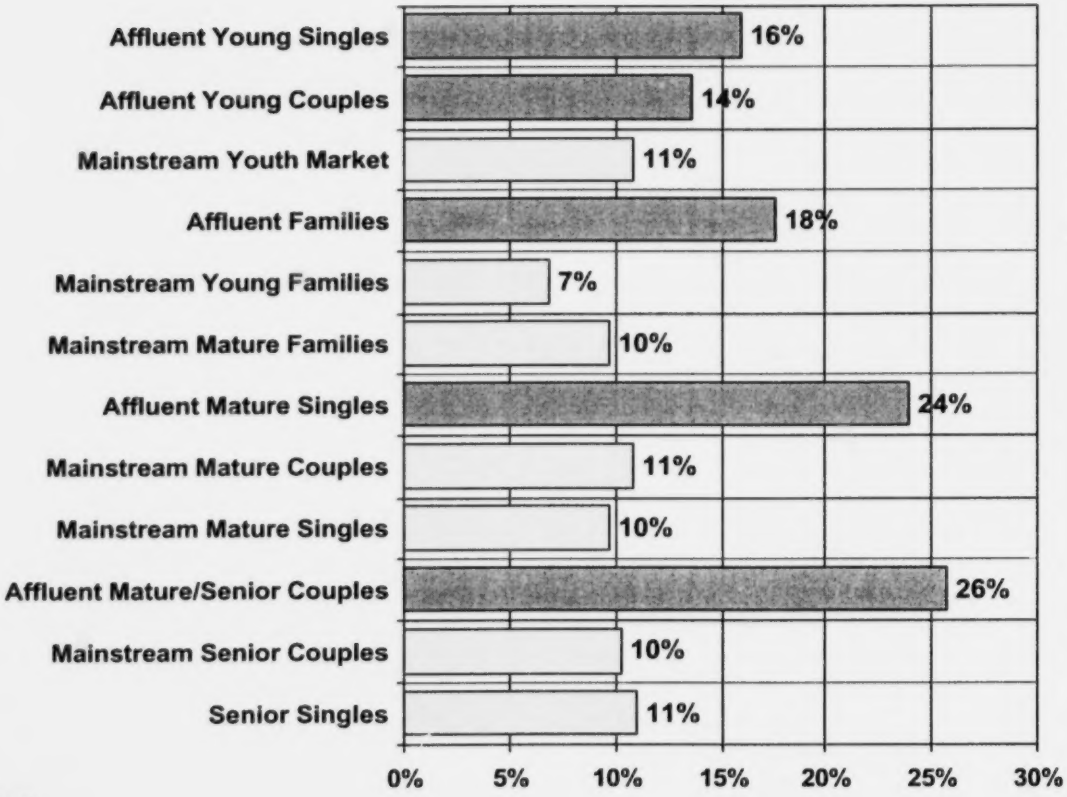


The Affluent Young Singles were the most likely to attend concerts. The Affluent Young Couples, the Mainstream Youth Market, the Affluent Mature Singles and the Affluent Mature and Senior Couples were also more likely to go to concerts.

Percent of Population (18 Plus) Frequently Attending

Live Theatre

By Market Segments: Canada and United States

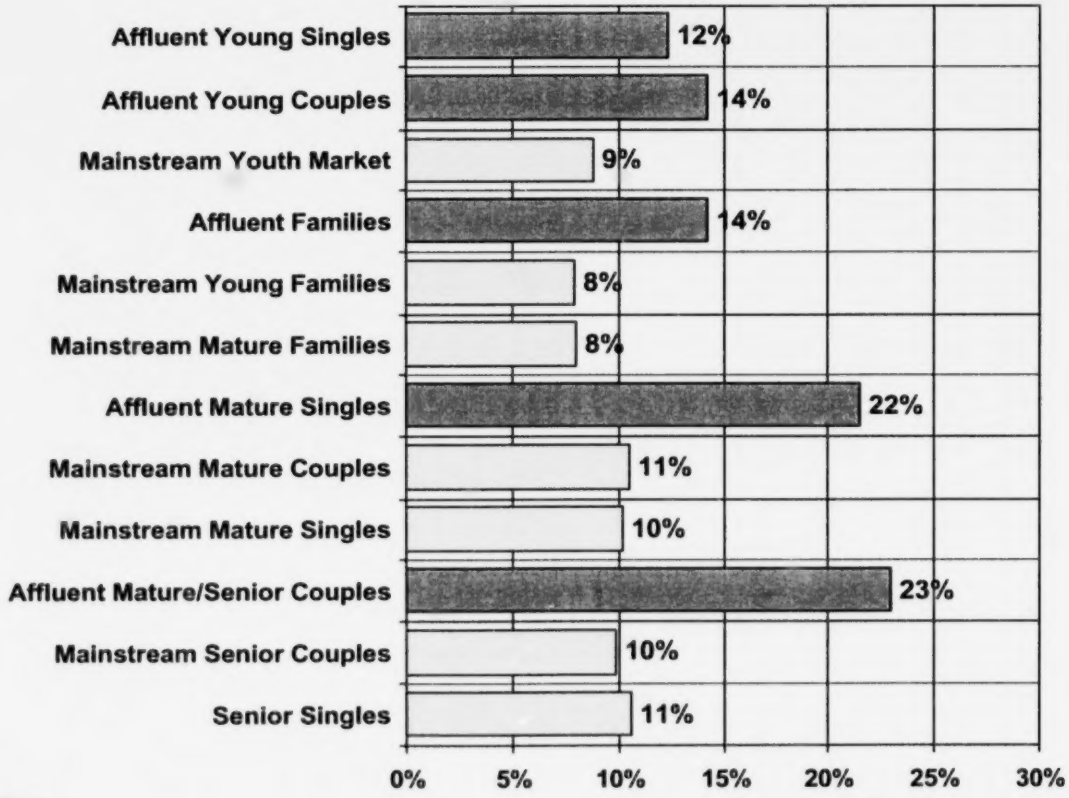


The five affluent segments were the most likely segments to go to live theatre. The Affluent Mature Singles and the Affluent Mature and Senior Couples were especially likely to go to live theatre.

Percent of Population (18 Plus) Frequently

Going To Museum

By Market Segments: Canada and United States

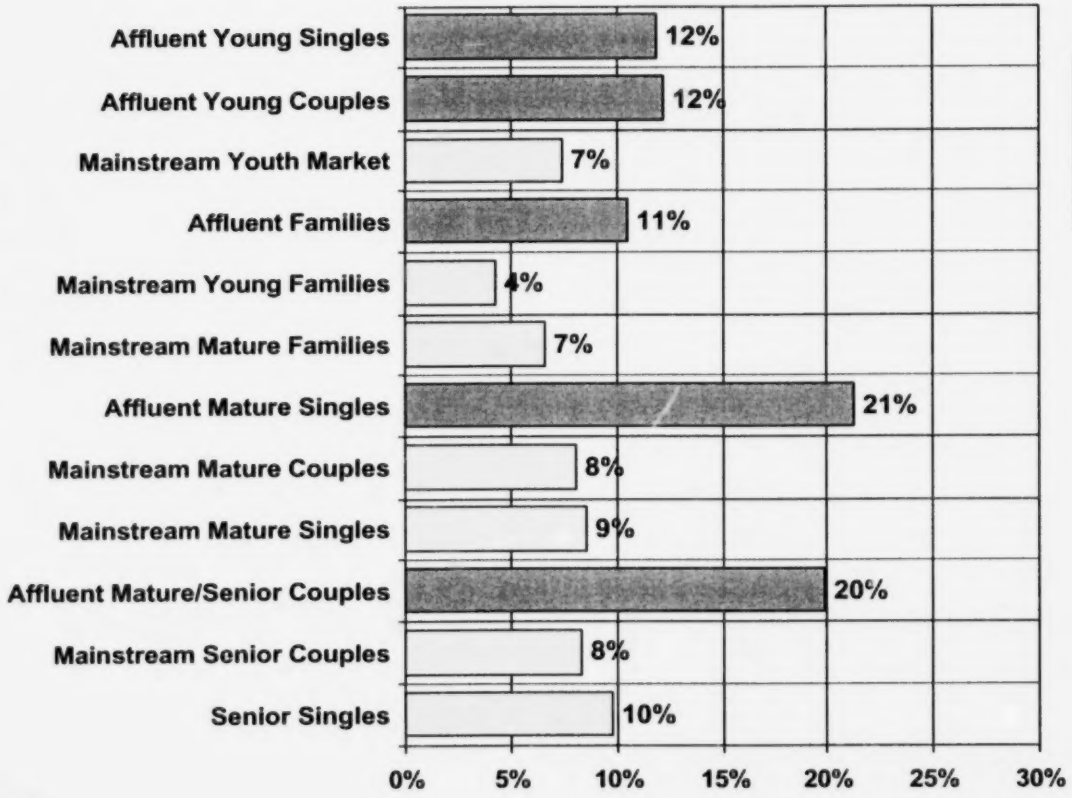


The five affluent segments were more likely to visit museums, and especially the Affluent Mature Singles and the Affluent Mature and Senior Couples.

Percent of Population (18 Plus) Frequently

Going To Art Galleries

By Market Segments: Canada and United States

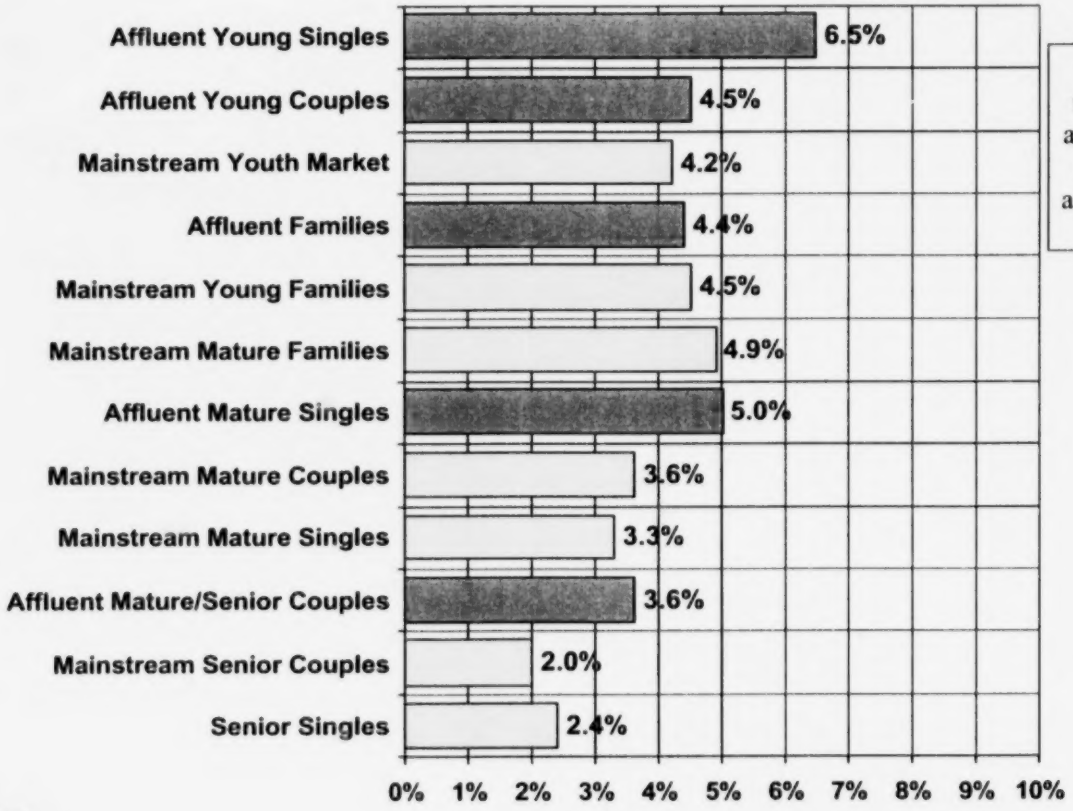


The five affluent segments were more likely to visit art galleries, and especially the Affluent Mature Singles and the Affluent Mature and Senior Couples.

Percent of Population (18 Plus) Frequently

Staying in a Hotel or Bed & Breakfast (In Same City/Town)

By Market Segments: Canada and United States

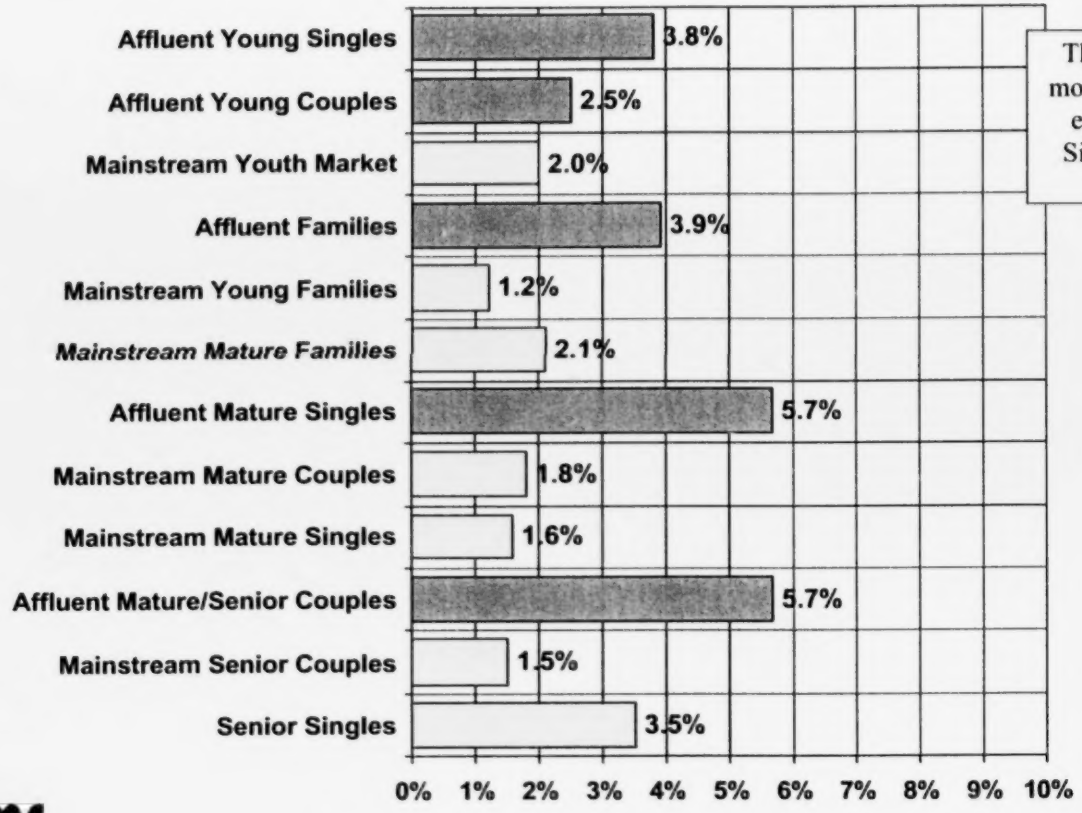


Affluent Young Singles were the most likely to stay in a hotel or bed and breakfast within the same city or town. The incidence of this sort of activity tends to decline as a function of the age of the respondent.

Percent of Population (18 Plus) Frequently

Going To Ballet

By Market Segments: Canada and United States

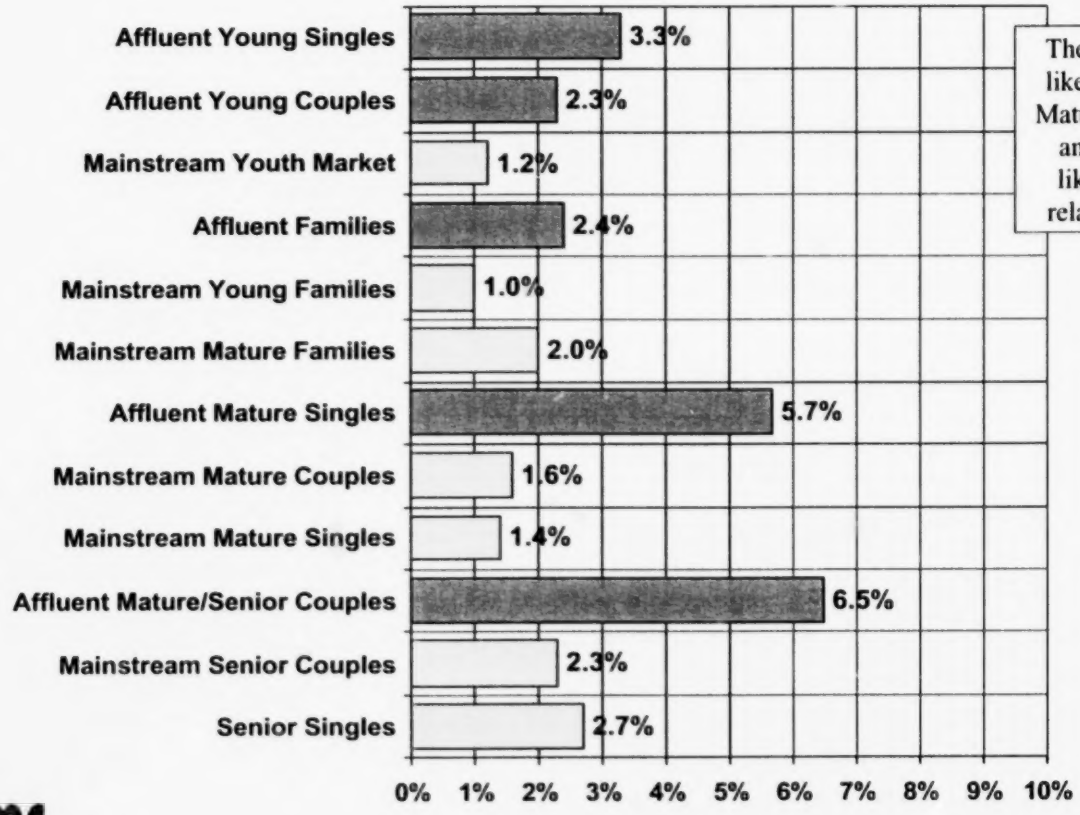


The five affluent segments were more likely to go to the ballet, and especially the Affluent Mature Singles and the Affluent Mature and Senior Couples.

Percent of Population (18 Plus) Frequently

Going To Opera

By Market Segments: Canada and United States



The five affluent segments were more likely to go to the opera. The Affluent Mature Singles and the Affluent Mature and Senior Couples were especially likely to frequently attend the opera relative to the other market segments.

Section Eight

Media Consumption Habits

Print Media Consumption Habits

- Key Findings -

Respondents were asked about their print media readership, television viewing habits and VCR rental habits to identify which media sources were the most efficient by which to reach various sectors of the travel market.

Readership of the travel section of the daily newspaper was strongly associated with the number of pleasure trips taken in the past two years. Frequent travelers were also more likely to read news magazines (e.g., Maclean's, Time), travel magazines, National Geographic and general interest magazines. These print media channels represent efficient methods by which to reach frequent travelers.

The relationship between the frequency of pleasure trips and television viewing preferences was weaker than that observed for print media. However, frequent travelers were more likely to watch professional sports and news magazine shows and unlikely to watch daytime television.

VCR rentals were moderately positively associated with the frequency of pleasure trips during the past two years. This reflects the fact that more affluent households were both more likely to rent videos and to take a greater number of pleasure trips.

The consumption of print media and television viewing habits varied widely across the market by lifecycle stage, education and household income. Strategically developed media plans can add significantly to the efficiency by which various sectors of the market are reached.

Print Media Consumption Habits

- Research Method -

In the telephone survey, respondents were asked whether they read various print media publications on a regular basis. The publications examined were:

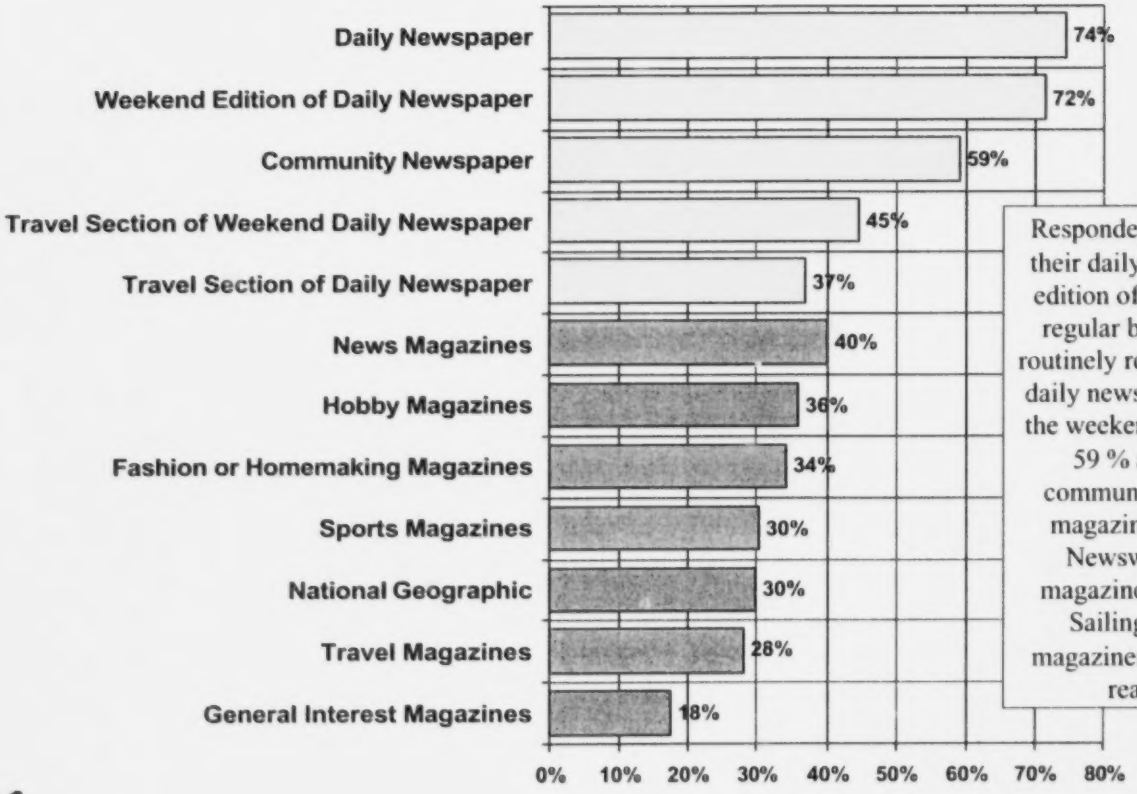
- Daily newspaper and travel section of the daily newspaper
- Weekend edition of the daily newspaper and its travel section
- Weekly or monthly community newspapers
- Travel magazines such as National Geographic Traveler, Travel & Leisure, Condé Nast Traveler
- National Geographic
- Sports magazines such as Sports Illustrated or specific sports magazines such as Golf Magazine, Sail Magazine, etc.
- Hobby magazines such as Food and Wine, Gardening
- News magazines such as Time, Newsweek or Maclean's
- Fashion/Homemaking magazines such as Vogue or Woman's Day
- General interest magazines such as The New Yorker or Harper's

This information was obtained to determine which print media sources would be most effective to reach various sectors of the travel market.

Percent of Total Population (18 Plus)

Reading Each Publication on Regular Basis

Canada and United States

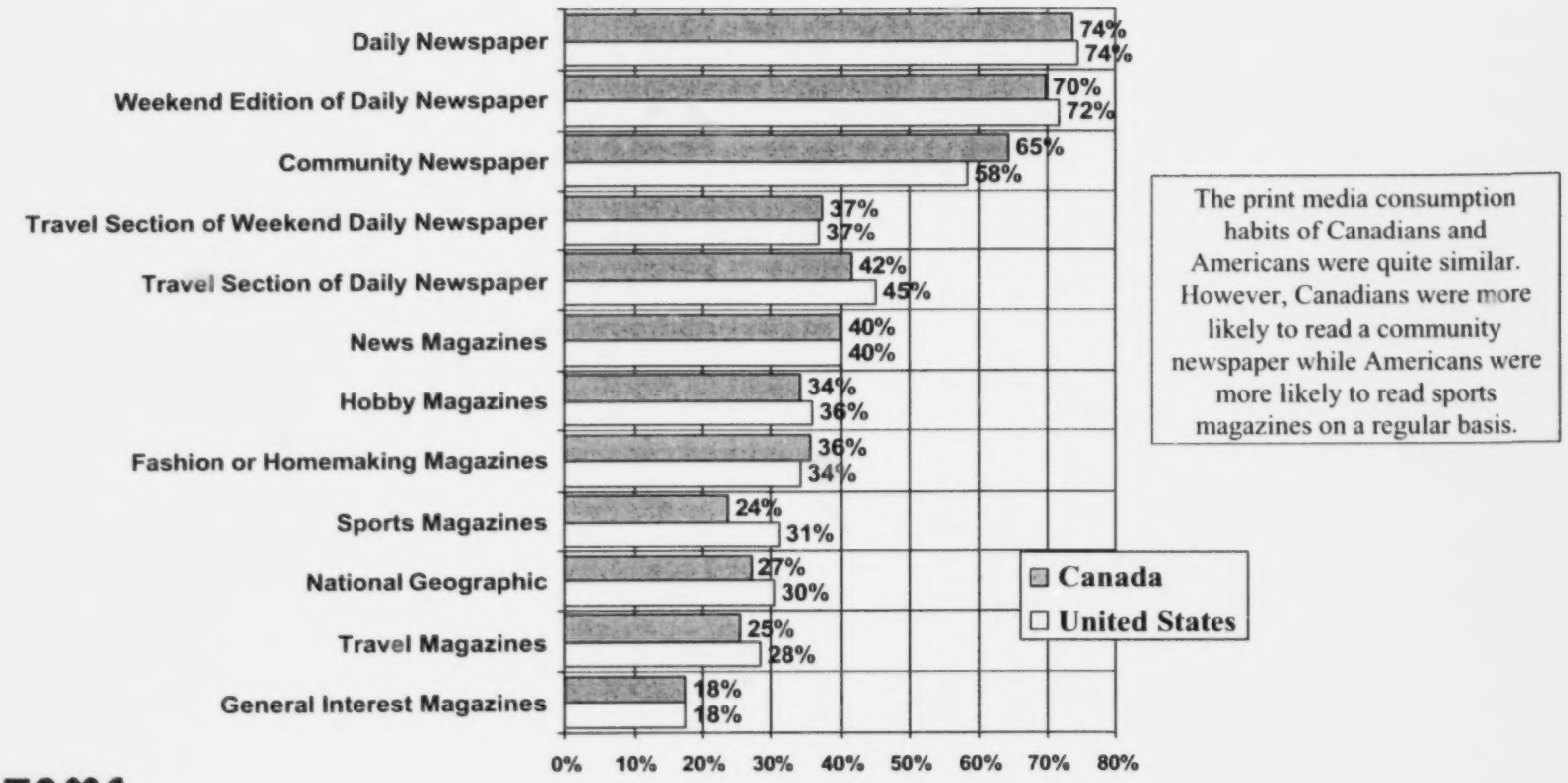


Respondents were most likely to read their daily newspaper or the weekend edition of their daily newspaper on a regular basis. About four in 10 also routinely read the travel section of their daily newspaper during the week or in the weekend edition of the newspaper. 59 % also routinely read their community newspaper. In terms of magazines, news magazines (e.g., Newsweek, Maclean's), hobby magazines (Sports Illustrated, Golf, Sailing) and Fashion or Home magazines were the most likely to be read on a routine basis.

Percent of Total Population (18 Plus)

Reading Each Publication on Regular Basis

Canada versus United States

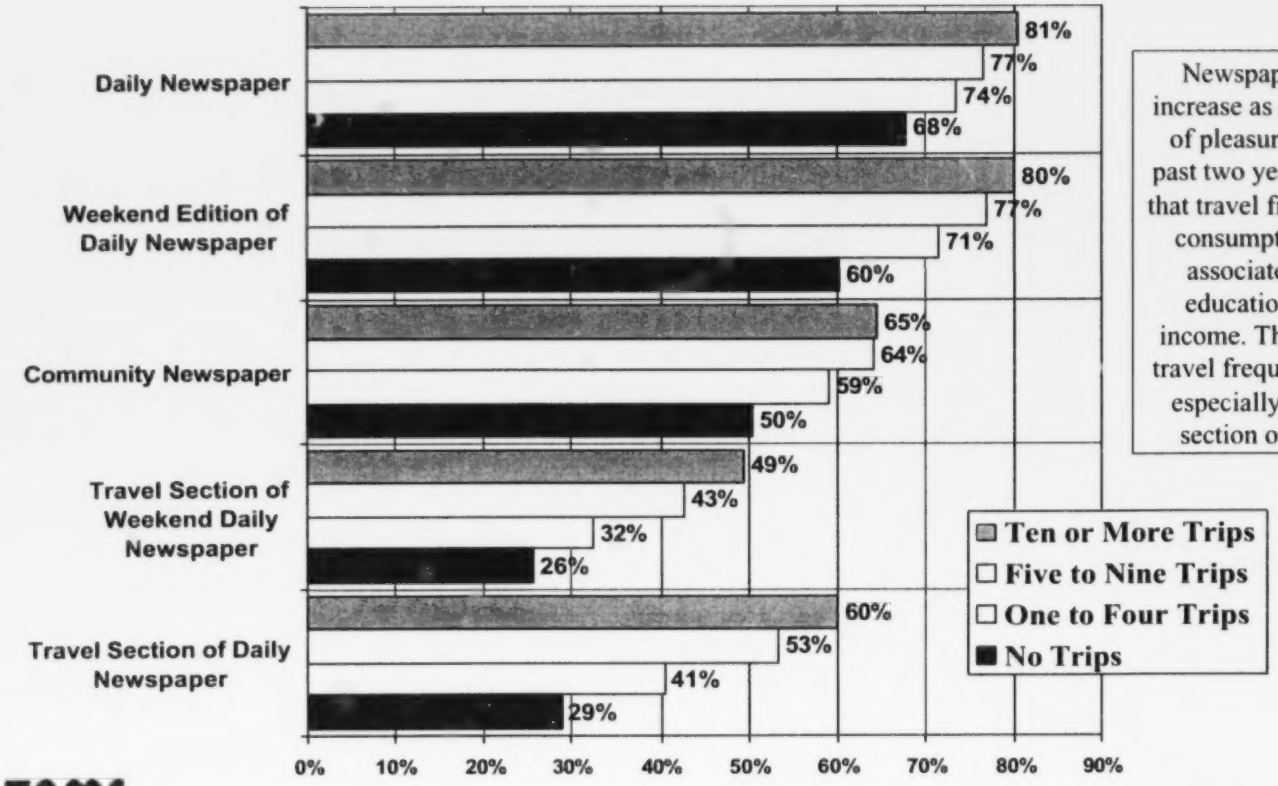


The print media consumption habits of Canadians and Americans were quite similar. However, Canadians were more likely to read a community newspaper while Americans were more likely to read sports magazines on a regular basis.

Percent of Population (18 Plus) Reading Each Type of Newspaper on Regular Basis

By Frequency of Pleasure Travel In Past Two Years

Canada and United States

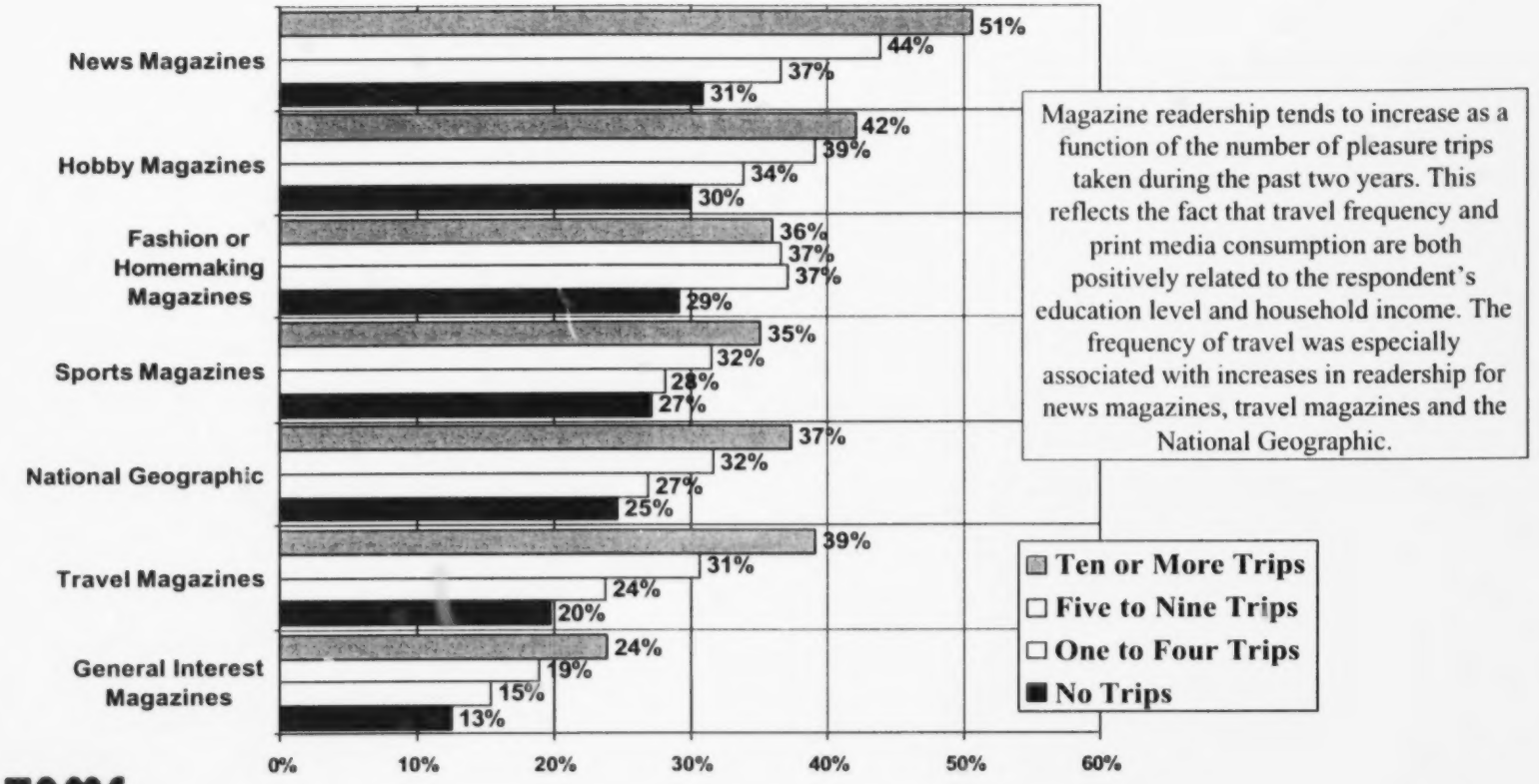


Newspaper readership tends to increase as a function of the number of pleasure trips taken during the past two years. This reflects the fact that travel frequency and print media consumption are both positively associated to the respondent's education level and household income. The link between pleasure travel frequency and readership was especially apparent for the travel section of the daily newspaper.

Percent of Population (18 Plus) Reading Each Type of Magazine on Regular Basis

By Frequency of Pleasure Travel In Past Two Years

Canada and United States

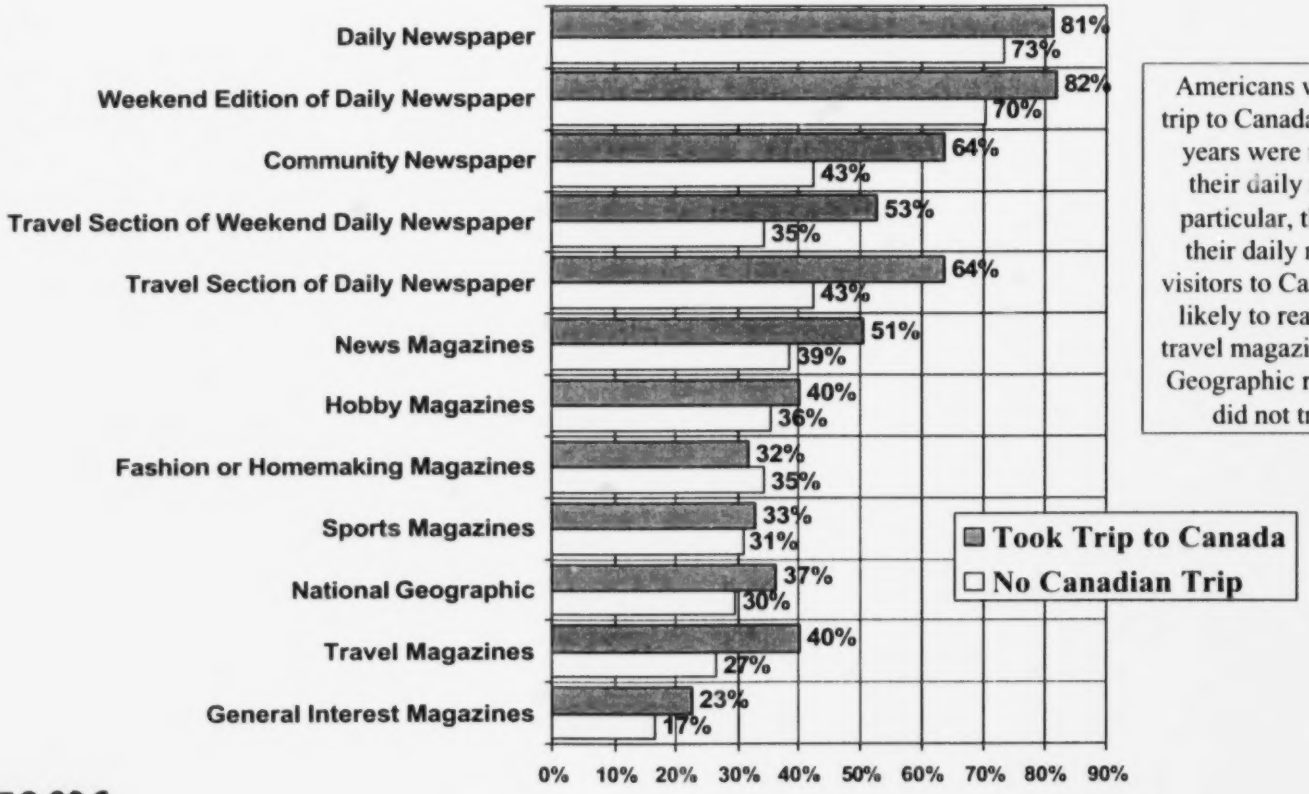


Magazine readership tends to increase as a function of the number of pleasure trips taken during the past two years. This reflects the fact that travel frequency and print media consumption are both positively related to the respondent's education level and household income. The frequency of travel was especially associated with increases in readership for news magazines, travel magazines and the National Geographic.

Percent of U.S. Population (18 Plus) Reading Print Publications on Regular Basis

Those Taking Pleasure Trip To Canada vs. Those Not

United States

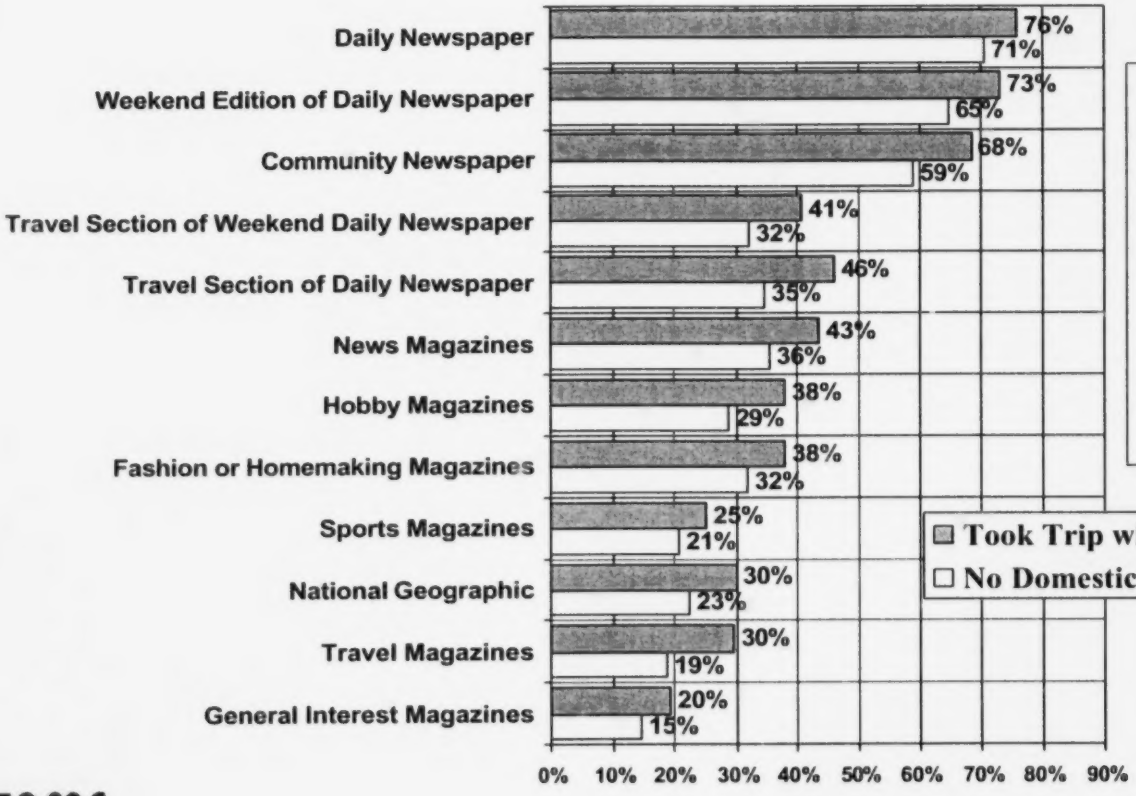


Americans who took a pleasure trip to Canada during the past two years were more likely to read their daily newspaper, and in particular, the travel section of their daily newspaper. Recent visitors to Canada were also more likely to read news magazines, travel magazines and the National Geographic relative to those who did not travel to Canada.

Percent of Canadian Population (18 Plus) Reading Print Publications on Regular Basis

Those Taking Pleasure Trip Within Canada vs. Those Not

Canada

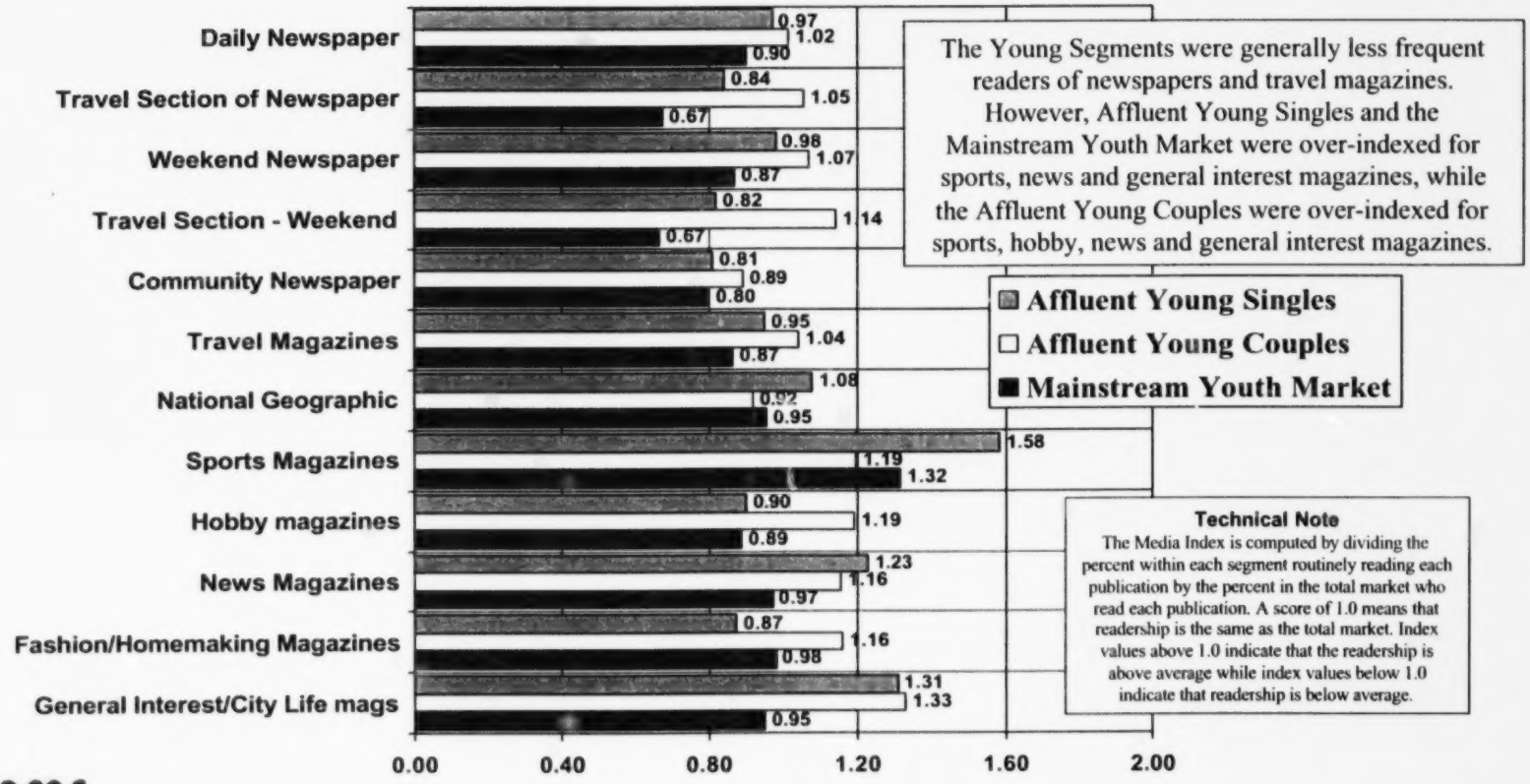


Canadians who took a domestic pleasure trip during the past two years were more likely to read their daily and community newspapers, and in particular, the travel section of their daily newspaper. Recent visitors to Canada were also more likely to read news magazines, hobby magazines, travel magazines and the National Geographic relative to those who did not take a domestic pleasure trip.

Media Indexing for Print Publications

Young Segments

Base: Canada and U. S.



The Young Segments were generally less frequent readers of newspapers and travel magazines. However, Affluent Young Singles and the Mainstream Youth Market were over-indexed for sports, news and general interest magazines, while the Affluent Young Couples were over-indexed for sports, hobby, news and general interest magazines.

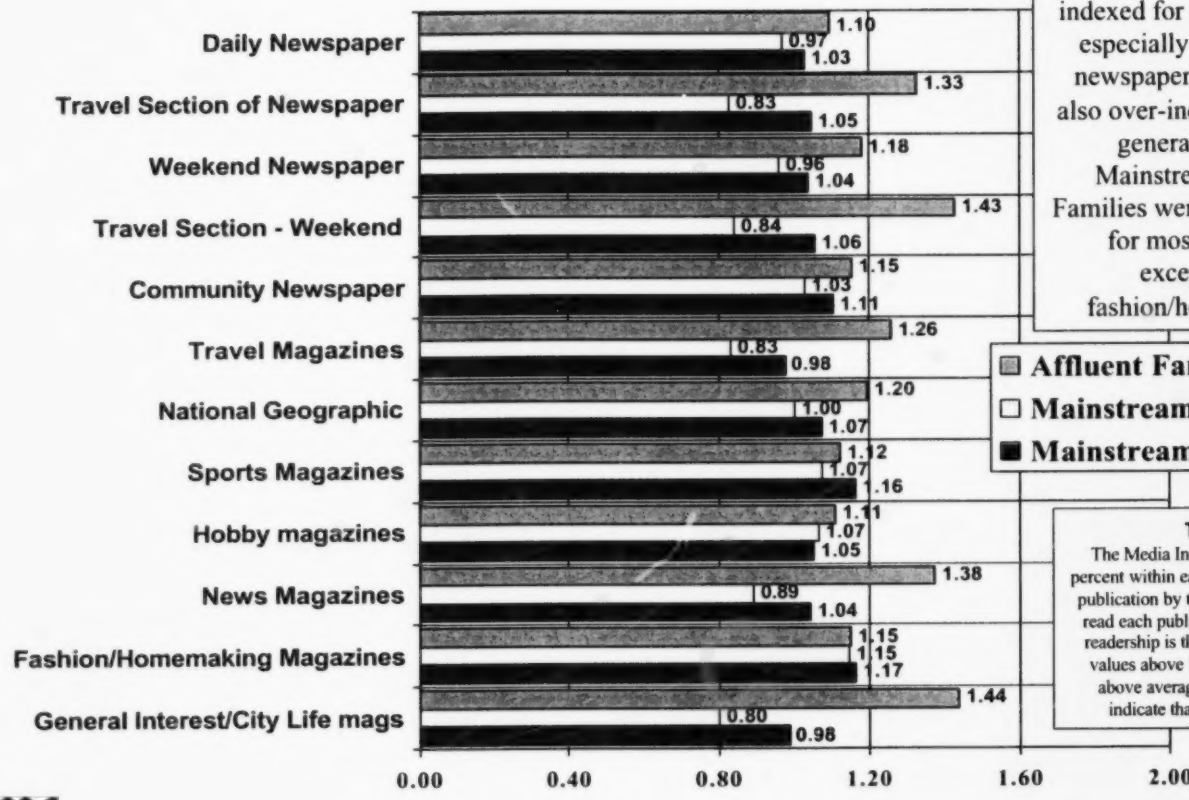
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who read each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average.

Media Indexing for Print Publications

Family Segments

Base: Canada and U. S.



The Affluent Families were over-indexed for newspaper readership and especially the travel section of the newspaper. Affluent Families were also over-indexed for travel, news and general interest magazines. Mainstream Young and Mature Families were generally under-indexed for most print media with the exception of sports and fashion/homemaking magazines.

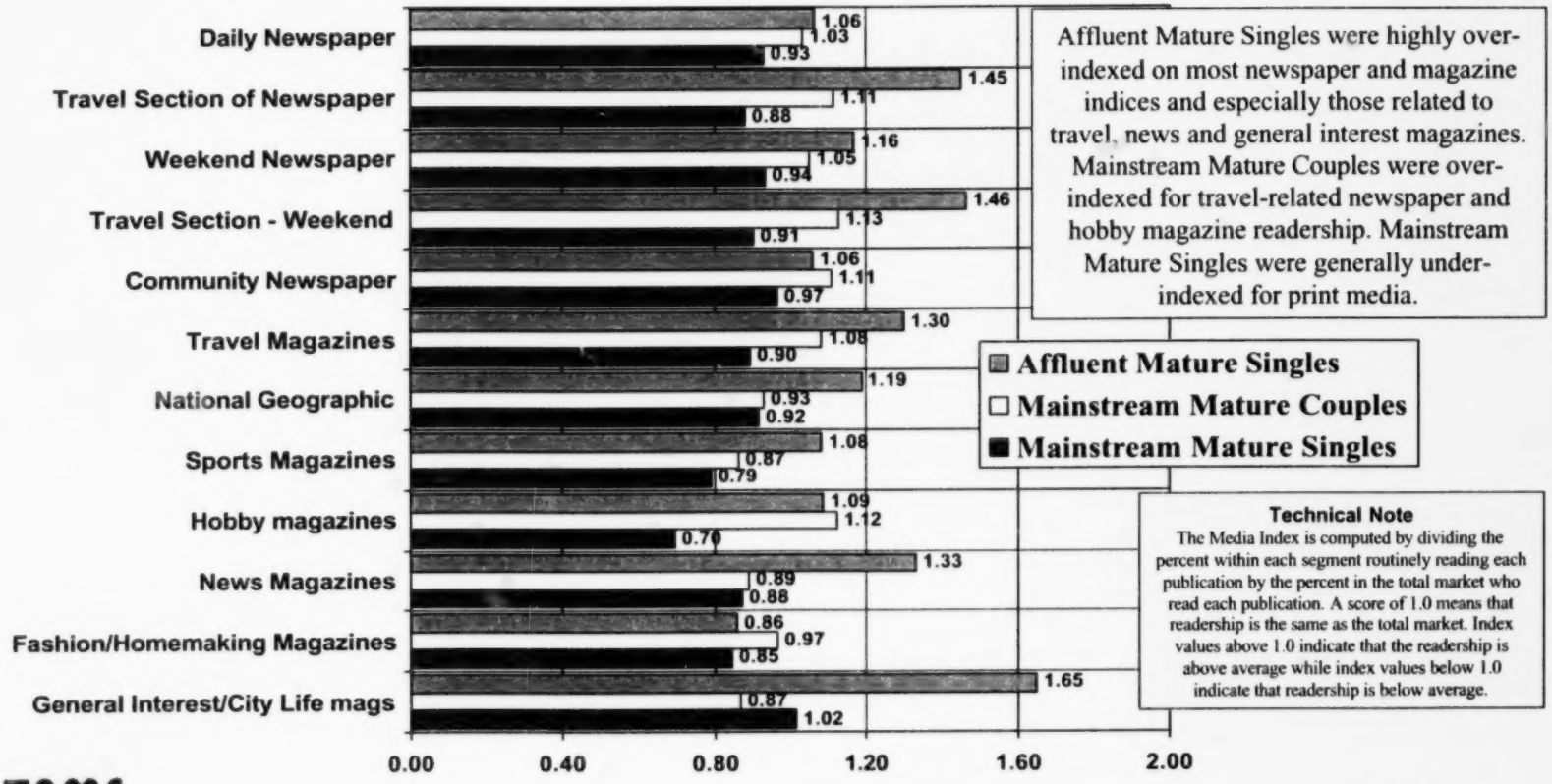
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who read each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average.

Media Indexing for Print Publications

Mature Segments

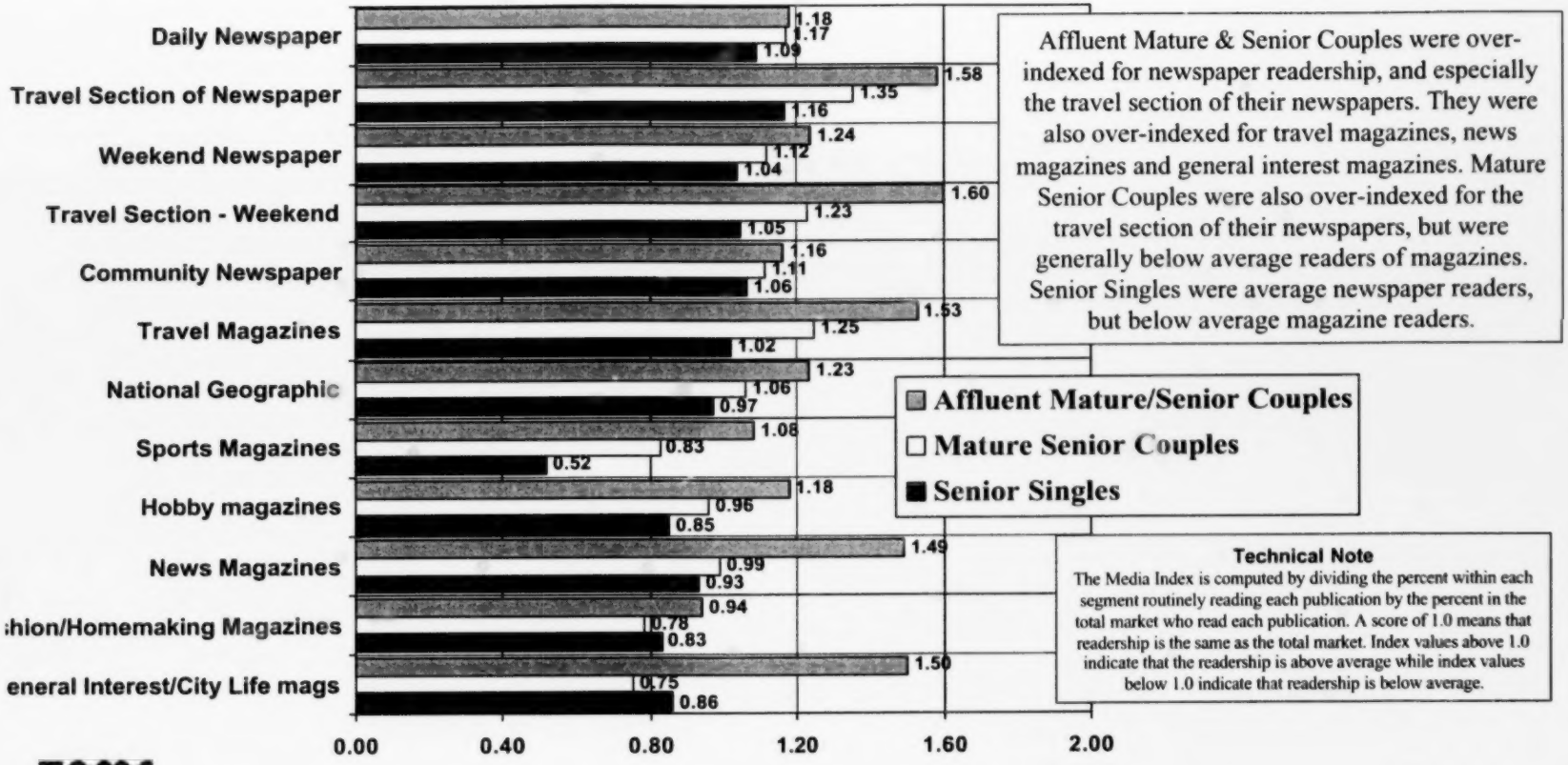
Base: Canada and U. S.



Media Indexing for Print Publications

Mature/Senior Segments

Base: Canada and U. S.



Types of Television Programs Viewed

- Research Method -

In the telephone survey, respondents were asked which of the following types of television programs they watched on a regular basis:

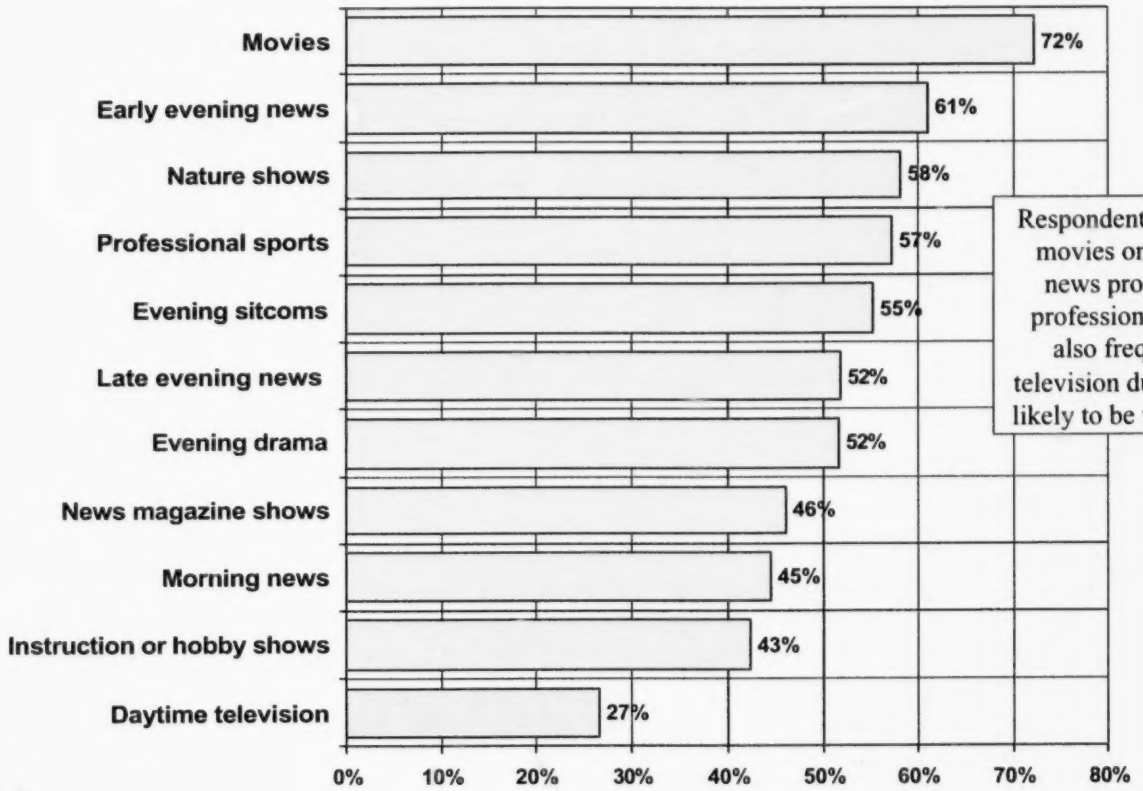
- Morning news shows
- Early evening news shows
- Late evening news shows
- News magazine shows
- Professional sports shows
- Daytime television during the weekdays
- Nature shows
- Instruction or hobby shows
- Movies shown on television
- Evening sitcoms
- Evening dramas

This information was obtained to determine which television programs would be most effective to reach various sectors of the travel market.

Percent of Total Population (18 Plus)

Regularly Watching Various Types of Television Programs

Canada and United States

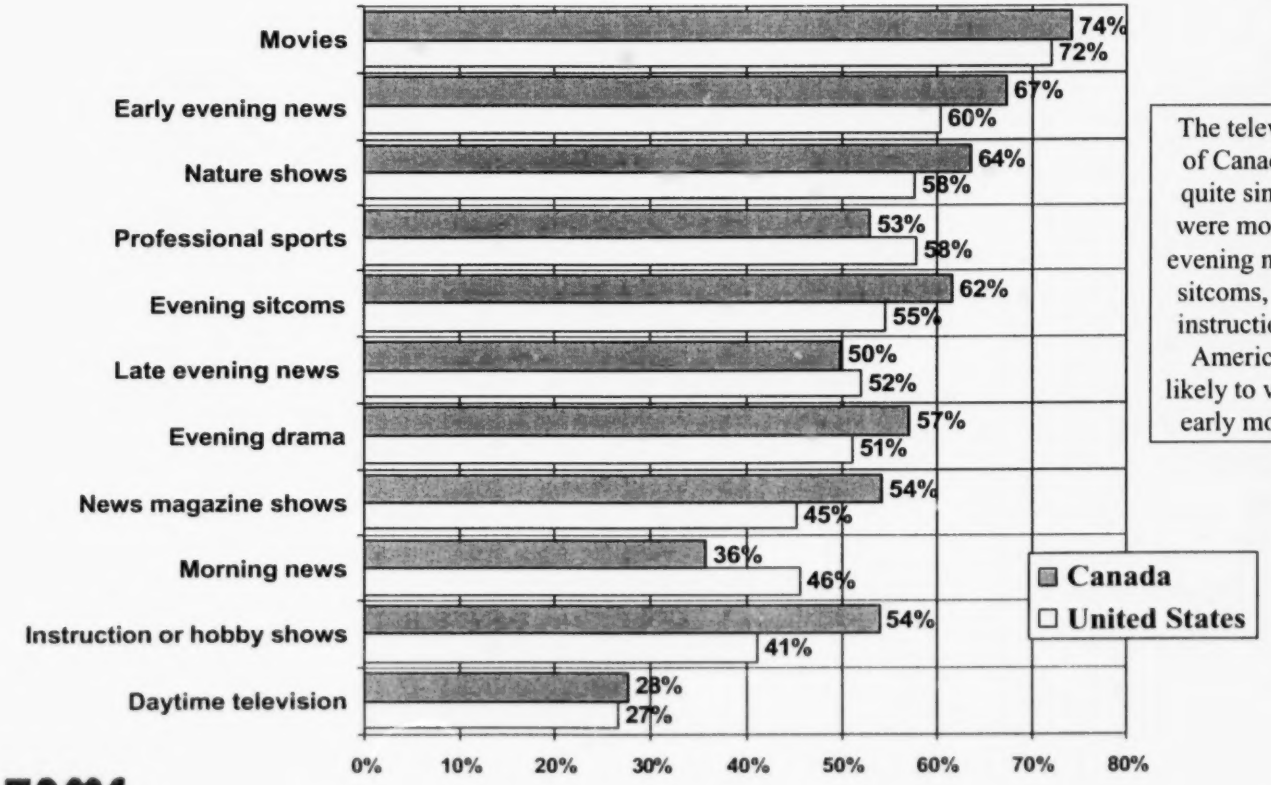


Respondents were most likely to watch movies on television. Early evening news programming, nature shows, professional sports and sitcoms were also frequently viewed. Daytime television during the week was the least likely to be watched by the respondents.

Percent of Total Population (18 Plus)

Regularly Watching Various Types of Television Programs

Canada versus United States

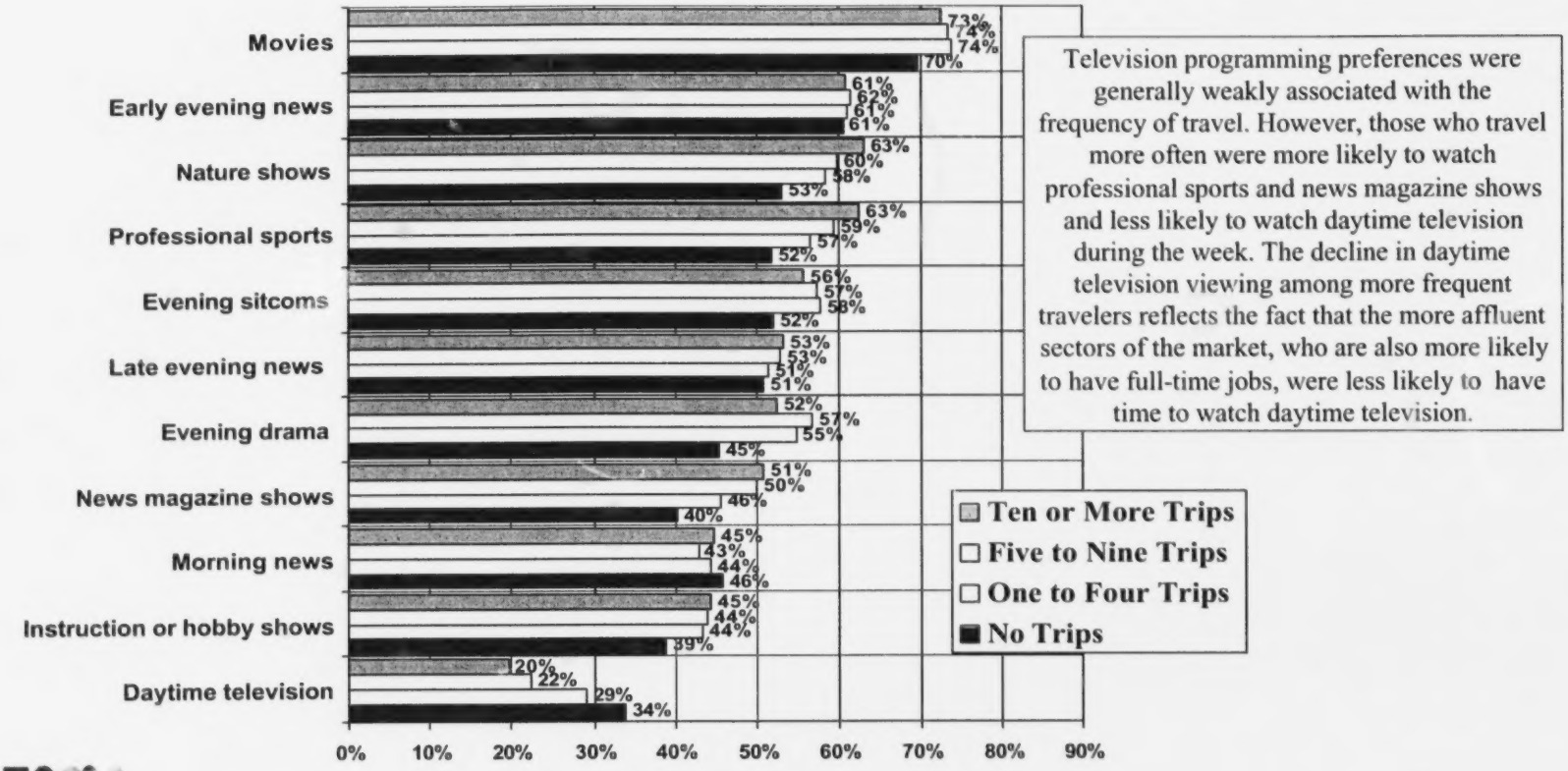


The television viewing preferences of Canadians and Americans were quite similar. However, Canadians were more likely to watch the early evening news, nature shows, evening sitcoms, news magazine shows and instructional or hobby shows while Americans were somewhat more likely to view professional sports and early morning news programming.

Percent of Population (18 Plus) Watching Various Types of TV Programs on Regular Basis

By Frequency of Pleasure Travel In Past Two Years

Canada and United States

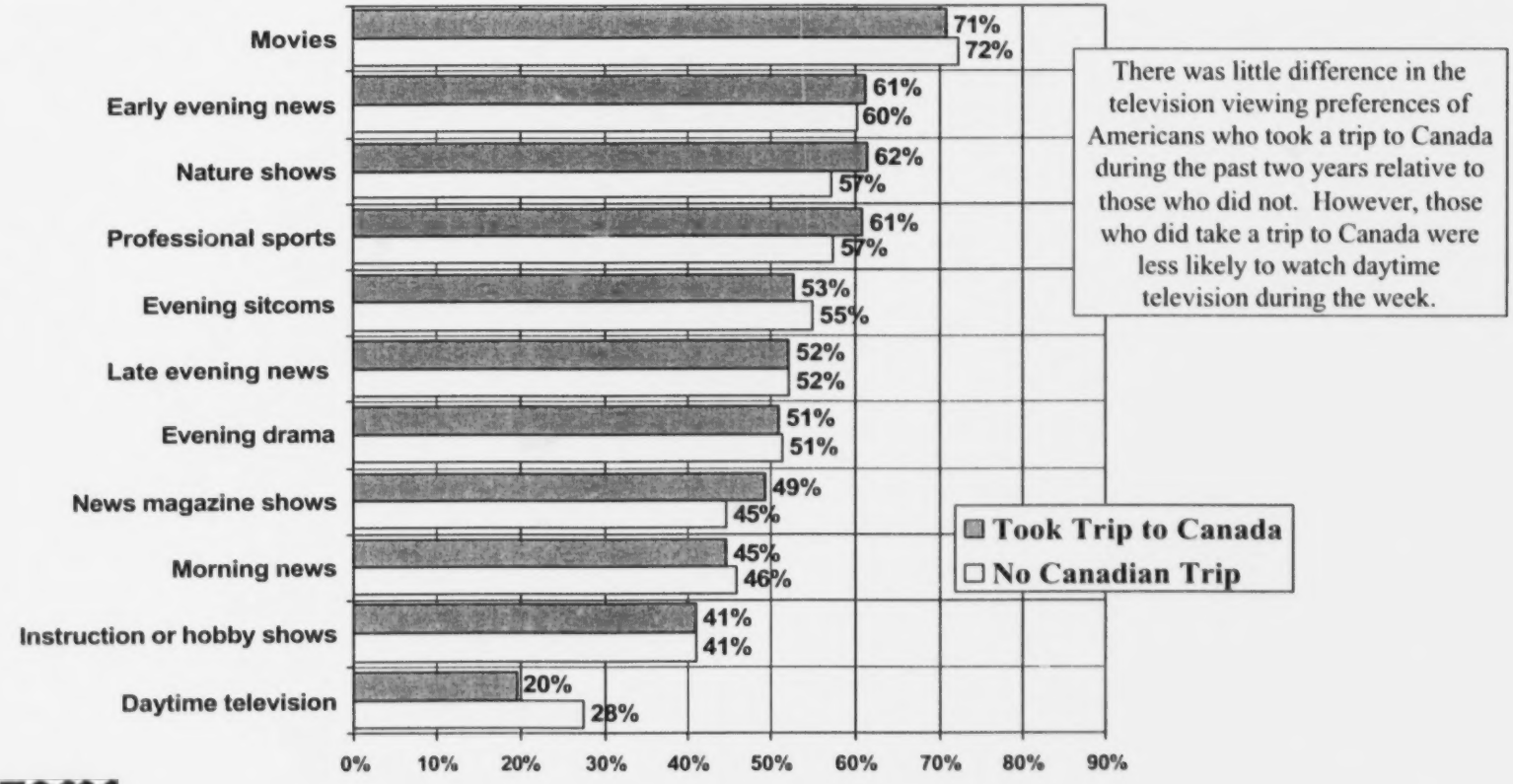


Television programming preferences were generally weakly associated with the frequency of travel. However, those who travel more often were more likely to watch professional sports and news magazine shows and less likely to watch daytime television during the week. The decline in daytime television viewing among more frequent travelers reflects the fact that the more affluent sectors of the market, who are also more likely to have full-time jobs, were less likely to have time to watch daytime television.

Percent of U.S. Population (18 Plus) Watching Various Types of TV Programming on Regular Basis

Those Taking Pleasure Trip To Canada vs. Those Not

United States



There was little difference in the television viewing preferences of Americans who took a trip to Canada during the past two years relative to those who did not. However, those who did take a trip to Canada were less likely to watch daytime television during the week.

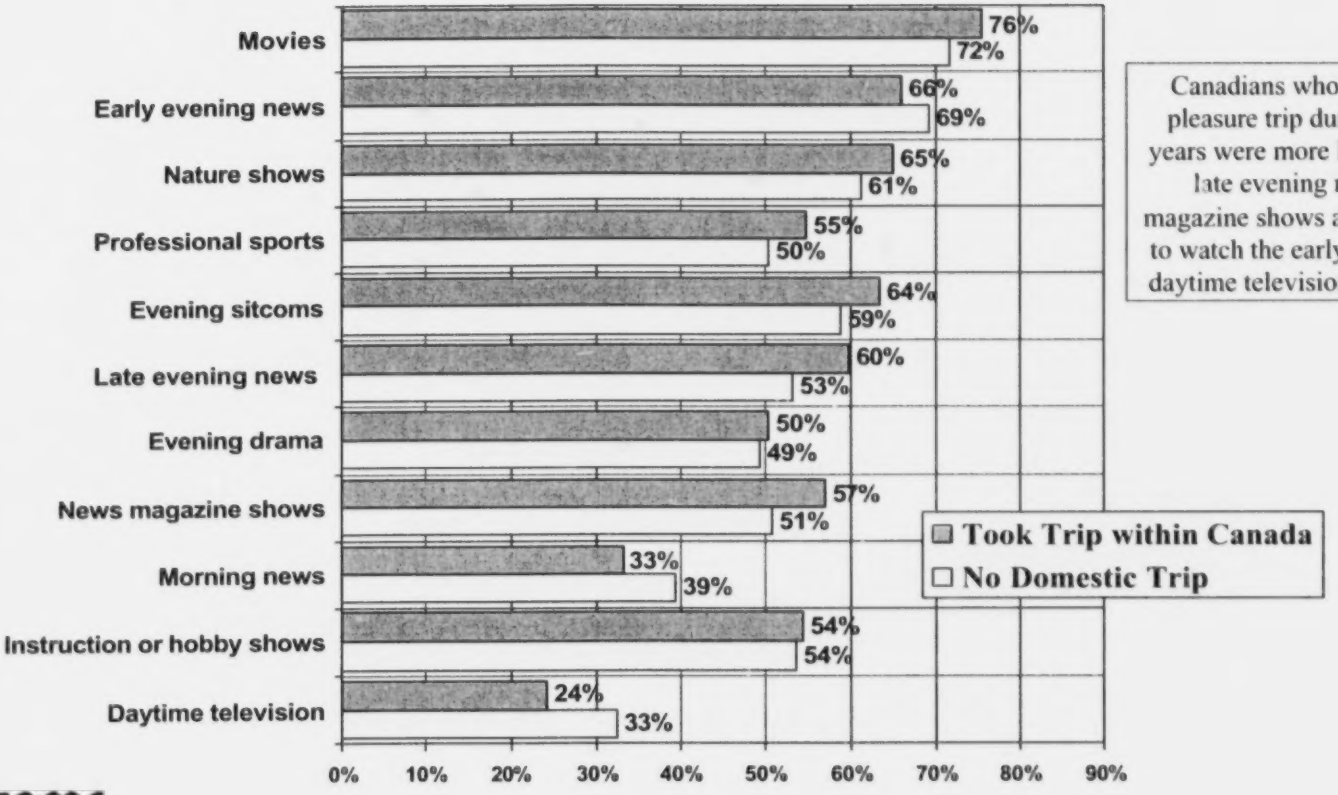
TAMS
Travel Activities & Motivation Survey

Lang

Percent of Canadian Population (18 Plus) Watching Various Types of TV Programming on Regular Basis

Those Taking Pleasure Trip Within Canada vs. Those Not

Canada



Canadians who took a domestic pleasure trip during the past two years were more likely to watch the late evening news and news magazine shows and were less likely to watch the early morning news or daytime television during the week.

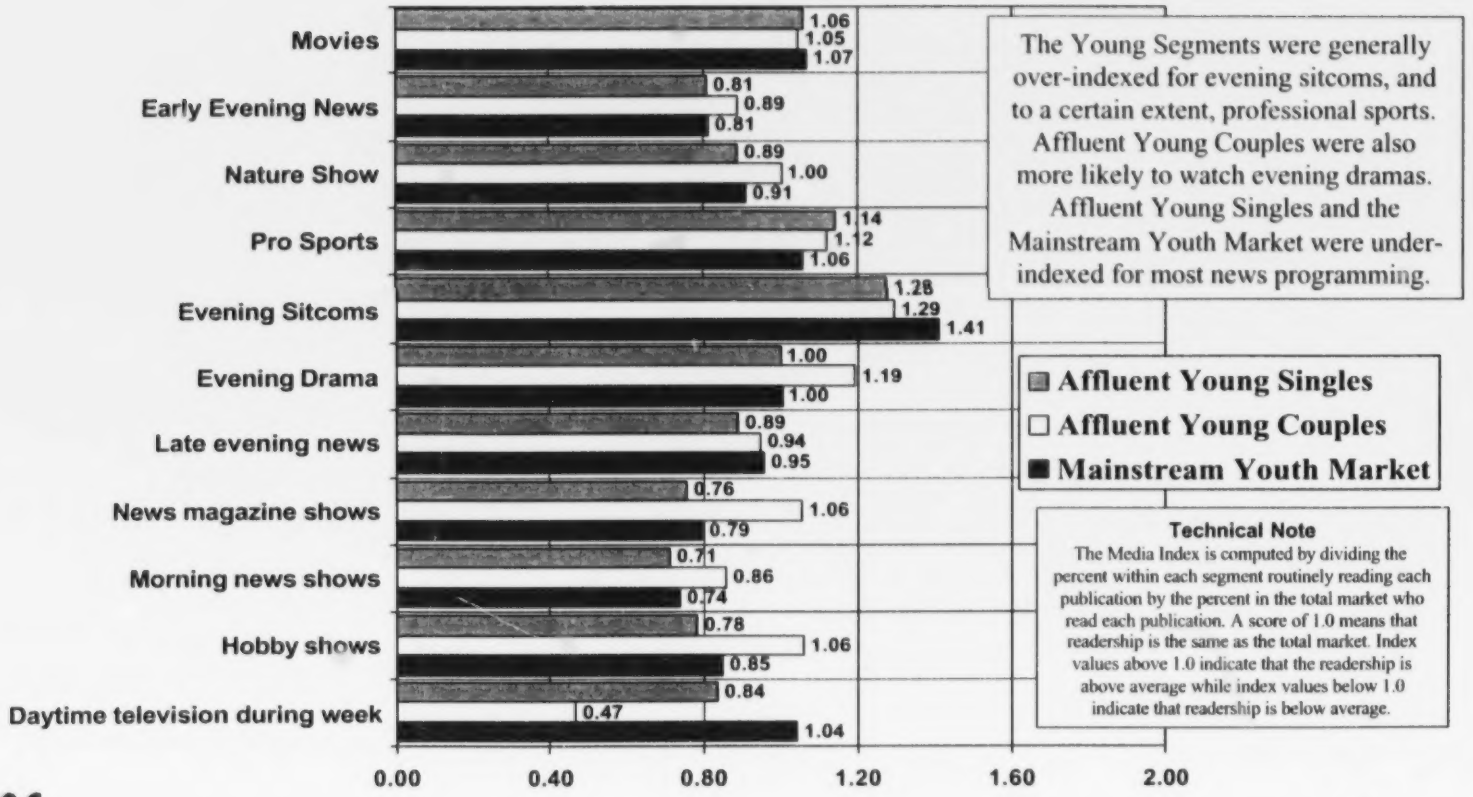
TAMS
Travel Activities & Motivation Survey

Lang

Media Indexing for Television Program Types

Young Segments

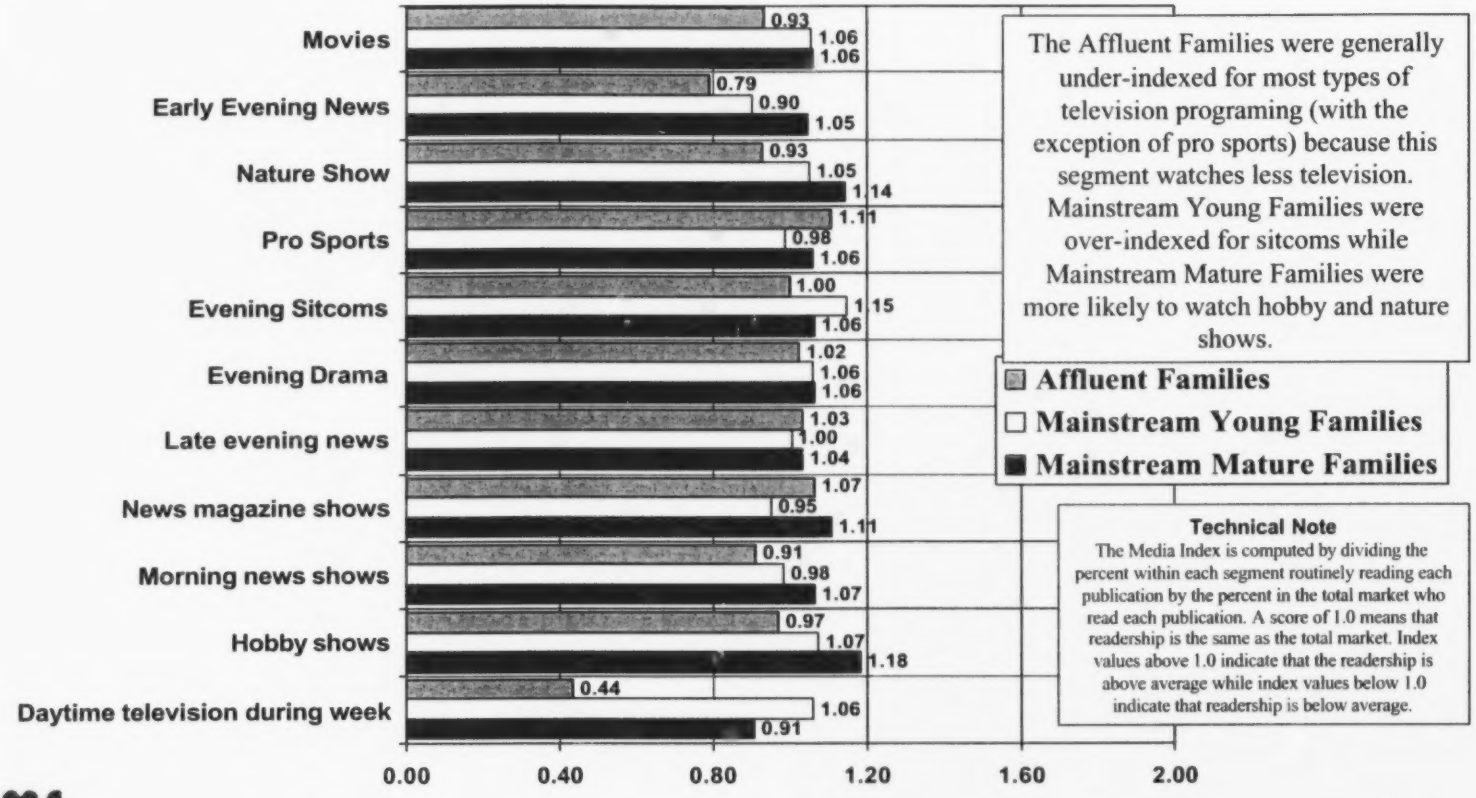
Base: Canada and U. S.



Media Indexing for Television Program Types

Family Segments

Base: Canada and U. S.



The Affluent Families were generally under-indexed for most types of television programing (with the exception of pro sports) because this segment watches less television. Mainstream Young Families were over-indexed for sitcoms while Mainstream Mature Families were more likely to watch hobby and nature shows.

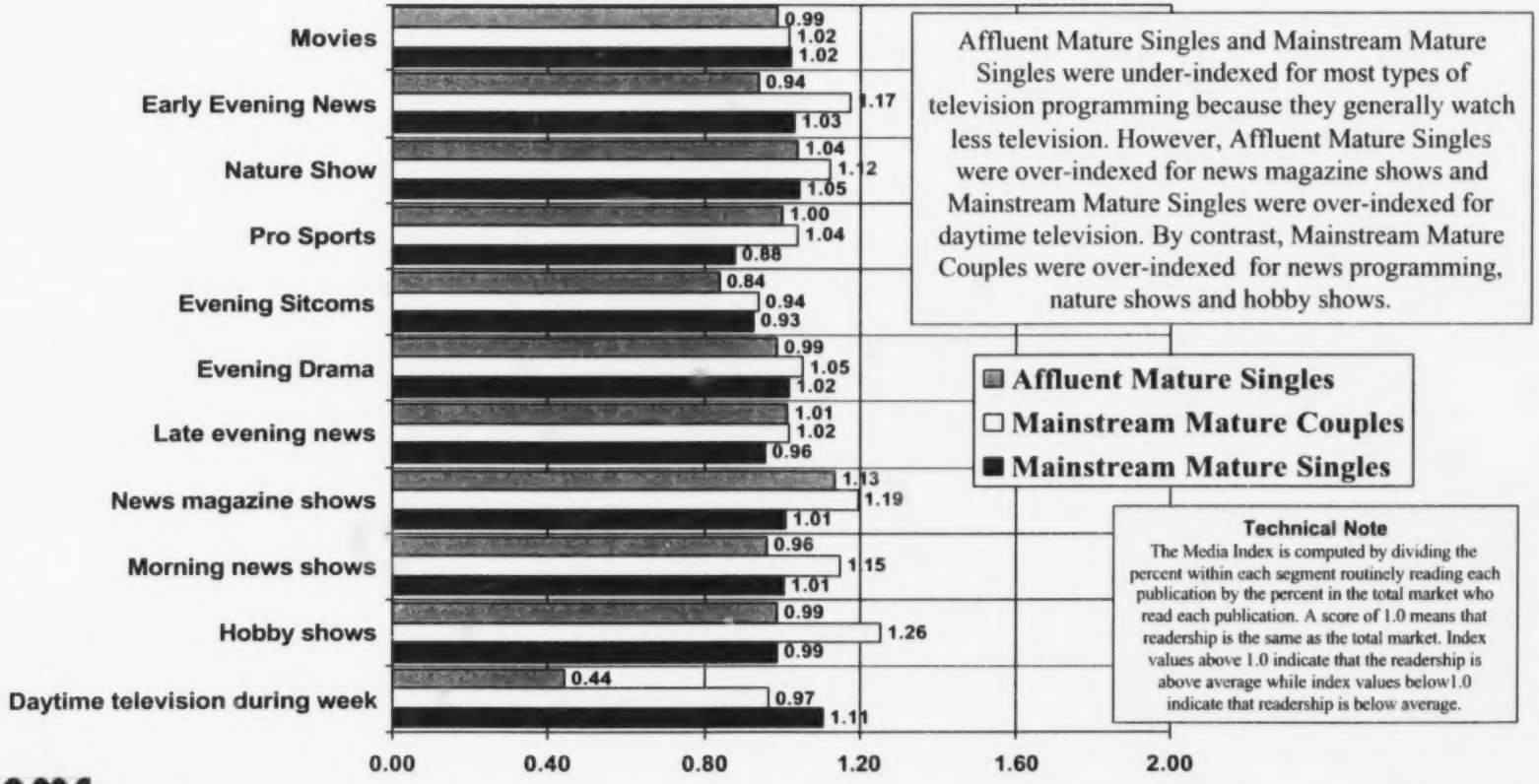
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who read each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average.

Media Indexing for Television Program Types

Mature Segments

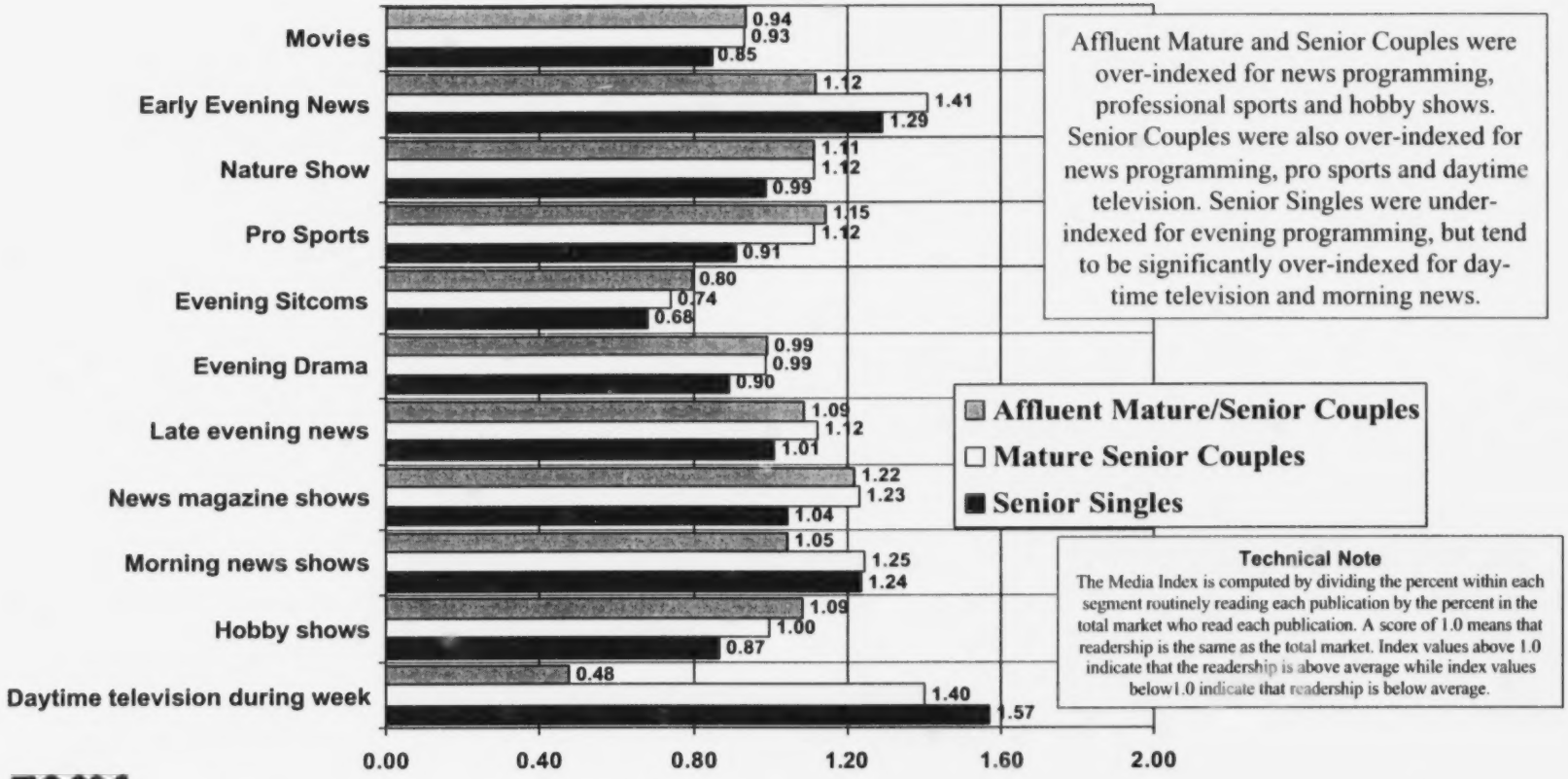
Base: Canada and U. S.



Media Indexing for Television Program Types

Mature/Senior Segments

Base: Canada and U. S.



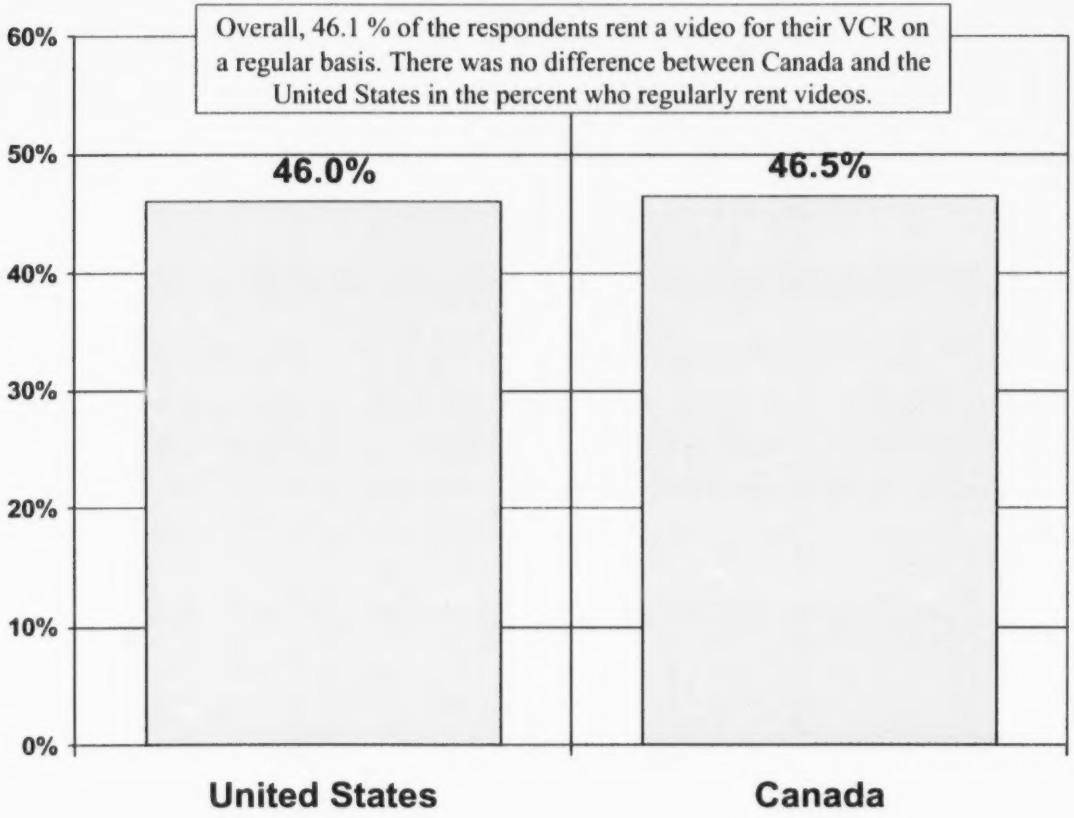
TAMS
Travel Activities & Motivation Survey

Lang

Percent of Total Population (18 Plus)

Who Regularly Rent Videos for VCR

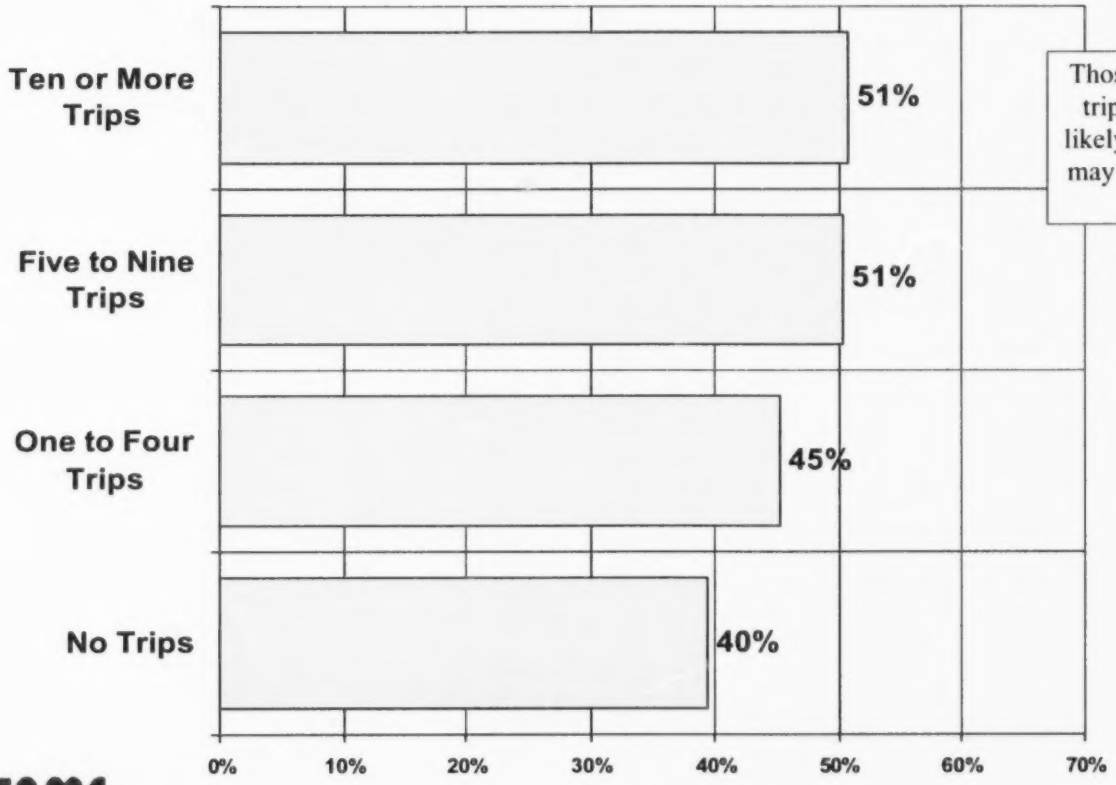
Canada versus the United States



Percent of Total Population (18 Plus) Who Regularly Rent Videos for VCR

By Frequency of Travel In Past Two Years

Canada and United States

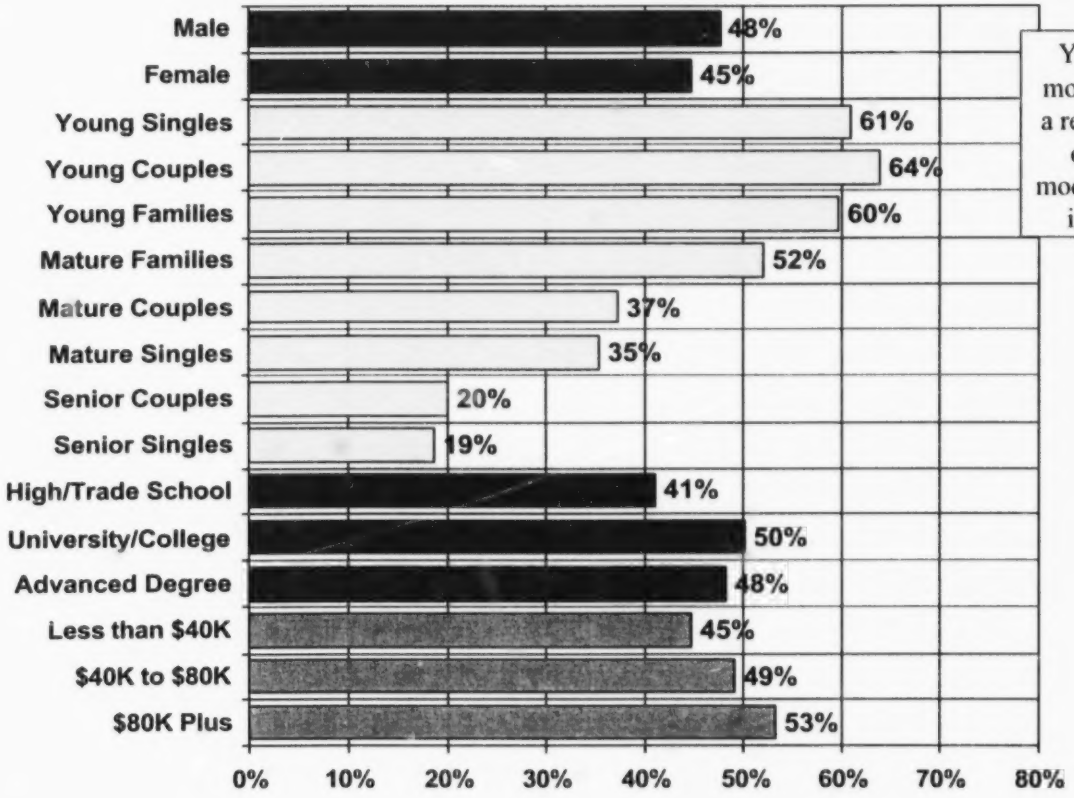


Those who travel frequently (five or more trips over the last two years) were more likely to regularly rent videos. This pattern may be a result of the increased affluence of the more frequent travelers.

Percent of Total Population (18 Plus) Who Regularly Rent Videos for VCR

By Demographics

Canada and United States

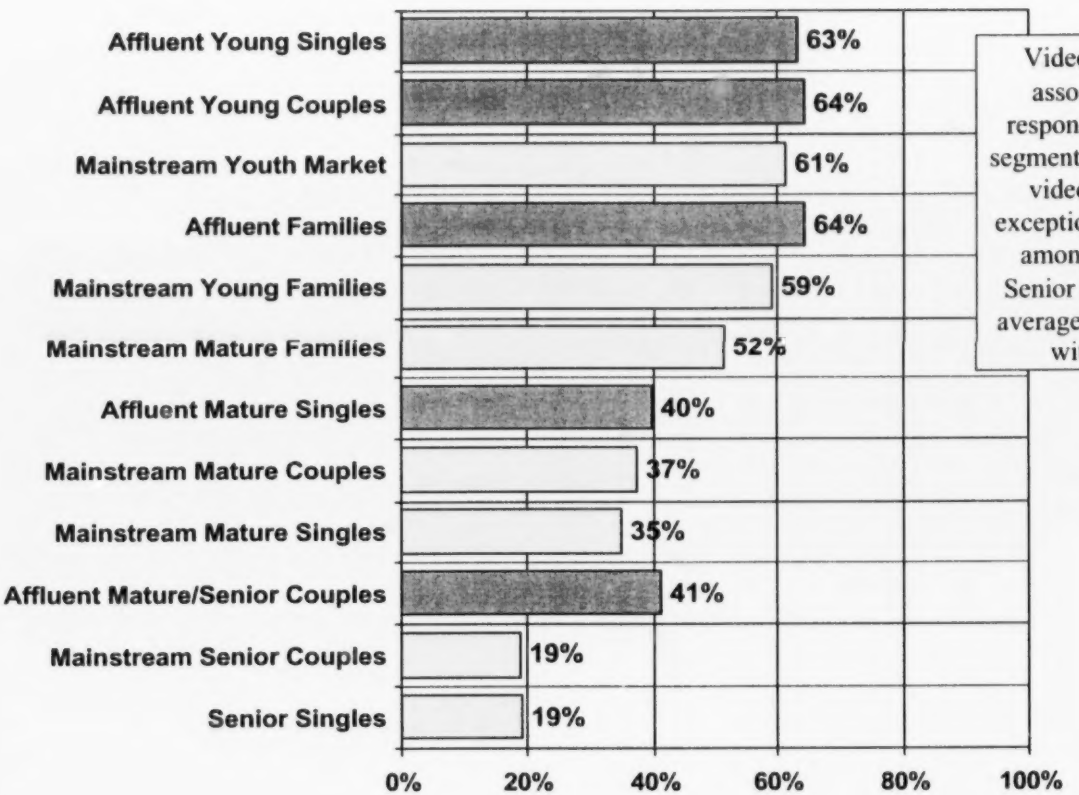


Younger respondents were more likely to rent a video on a regular basis. The incidence of video rentals was also moderately associated with the income of the household.

Percent of Total Population (18 Plus) Who Regularly Rent Videos for VCR

By Market Segment

Canada and United States



Video rental was most strongly associated with the age of the respondent. Those from the Youth segments were the most likely to rent videos on a regular basis. One exception to this trend was observed among the Affluent Mature and Senior Couples, who rent an above average number of video, compared with their same-age peers.

Section Nine

Internet Usage

Use of the Internet

- Key Findings -

47.0 % of the U.S. population (18 plus) and 37.6 % of the Canadian population (18 plus) report using the Internet on a regular basis as a source of information (not just travel information).

Use of the Internet as an information source was strongly associated with the frequency with which pleasure trips were taken during the last two years. Thus, 63 % of those who had taken 10 or more pleasure trips during the past two years have used the Internet as a source for information, while only 28 % of those who did not take a pleasure trip use the Internet regularly.

Use of the Internet as an information source increased sharply with increases in the education level of the respondent and the overall household income. Younger respondents were also more likely to use the Internet as an information source. However, the incidence of Internet usage was quite high among the Affluent Mature Singles and the Affluent Mature and Senior Couples, which are important segments of the travel market.

13.3 % of the North American population (18 plus) have booked a pleasure trip through the Internet. Americans were almost three times as likely to have booked a trip through the Internet (14.2 %) than were Canadians (5.2 %). Tourism e-commerce appears to be more advanced in the United States than in Canada at this time.

As with use of the Internet as an information source, the incidence of pleasure trips being booked through the Internet increased sharply with increases in the education level of the respondent and the household income.

The affluence of the household (based on education and income) was a better predictor of the use of the Internet to book trips than the age of the respondent. As such, there was almost no difference in the incidence of pleasure trips being booked through the Internet across the five affluent segments. On the other hand, the use of the Internet to book travel generally declined as a function of the age of the respondent within the seven mainstream segments.

Use of the Internet

- Research Method -

In the telephone survey, respondents were asked whether they regularly used the Internet as a source of information (not just travel information).

They were also asked whether they had personally booked a trip over the Internet in the last two years.

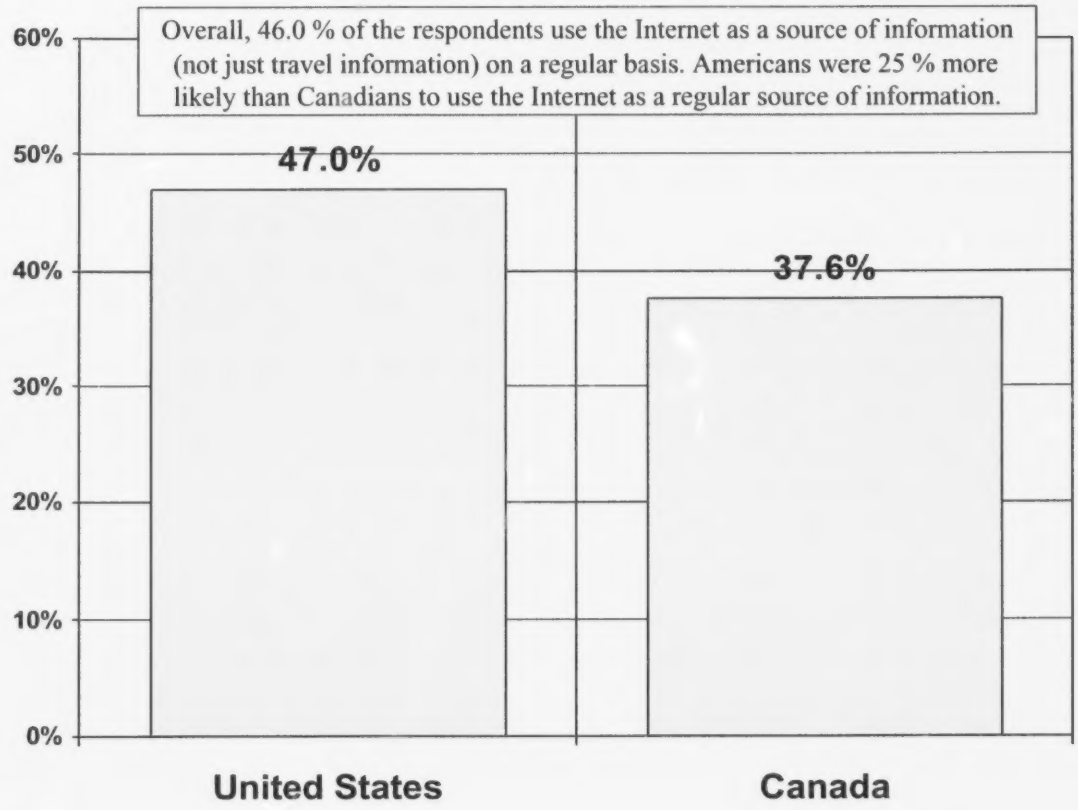
In the mailback survey, those who had taken a brief (1 to 3 day) and/or longer (4 or more day) vacation during the past two years were asked whether they had used the Internet to obtain information about the destination, accommodations, sites, maps and so forth.

This section of the report reviews the results of this portion of the survey.

Percent of Total Population (18 Plus)

Who Regularly Use The Internet as Information Source

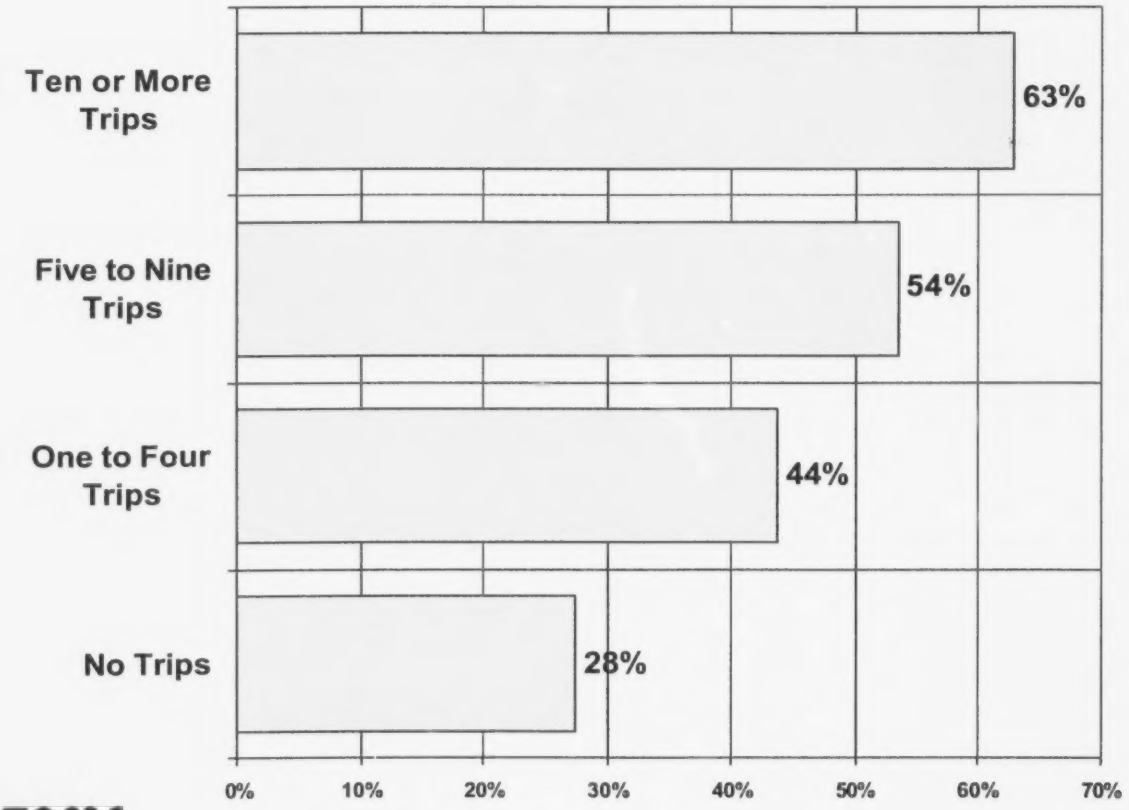
Canada versus the United States



Percent of Total Population (18 Plus) Who Regularly Use The Internet

By Frequency of Travel In Past Two Years

Canada and United States

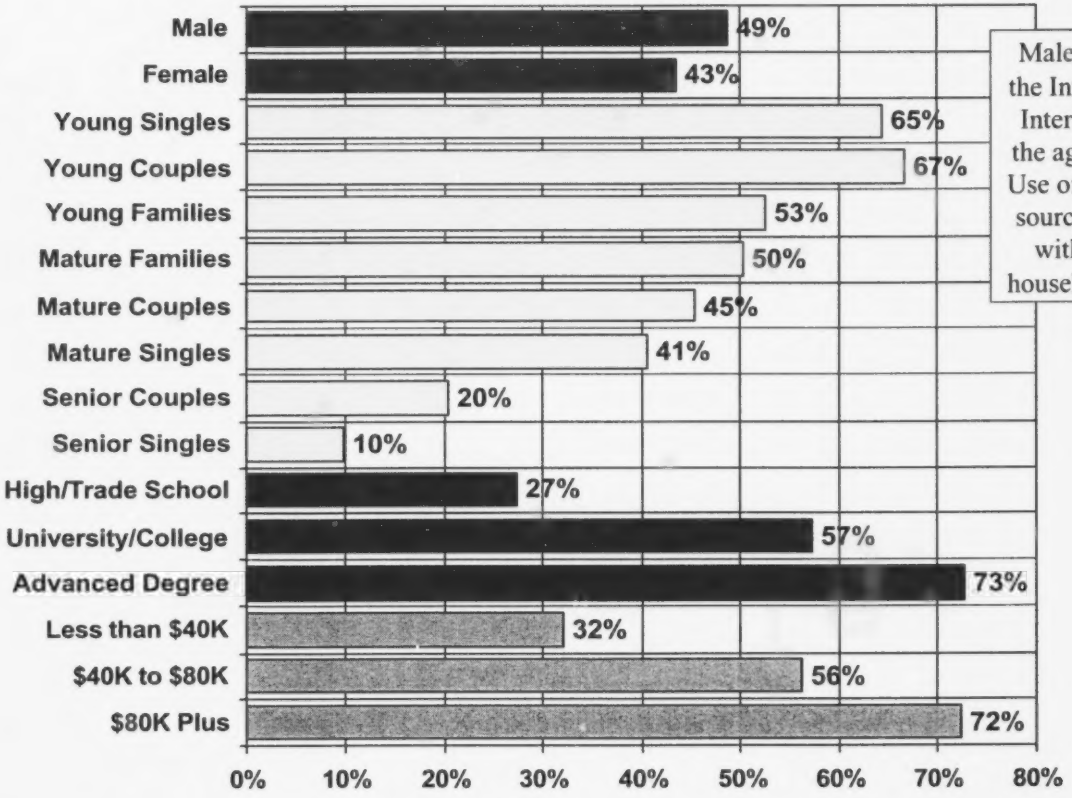


Use of the Internet as a source of information was strongly correlated with the respondent's travel frequency over the last two years. This pattern may be a result of the increased affluence of the more frequent travelers.

Percent of Total Population (18 Plus) Who Regularly Use The Internet

By Demographics

Canada and United States

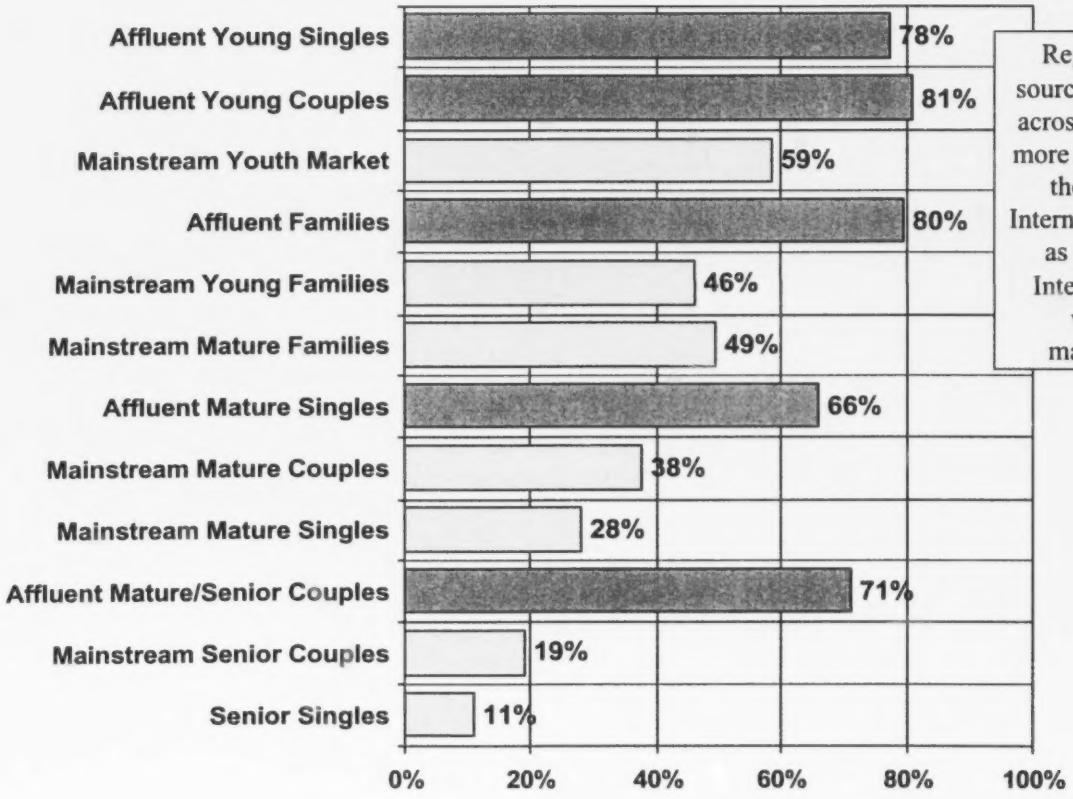


Males were more frequent users of the Internet than females. Use of the Internet also tended to decrease as the age of the respondent increased. Use of the Internet as an information source was also strongly correlated with the education level and the household income of the respondent.

Percent of Total Population (18 Plus) Who Regularly Use The Internet

By Market Segment

Canada and United States

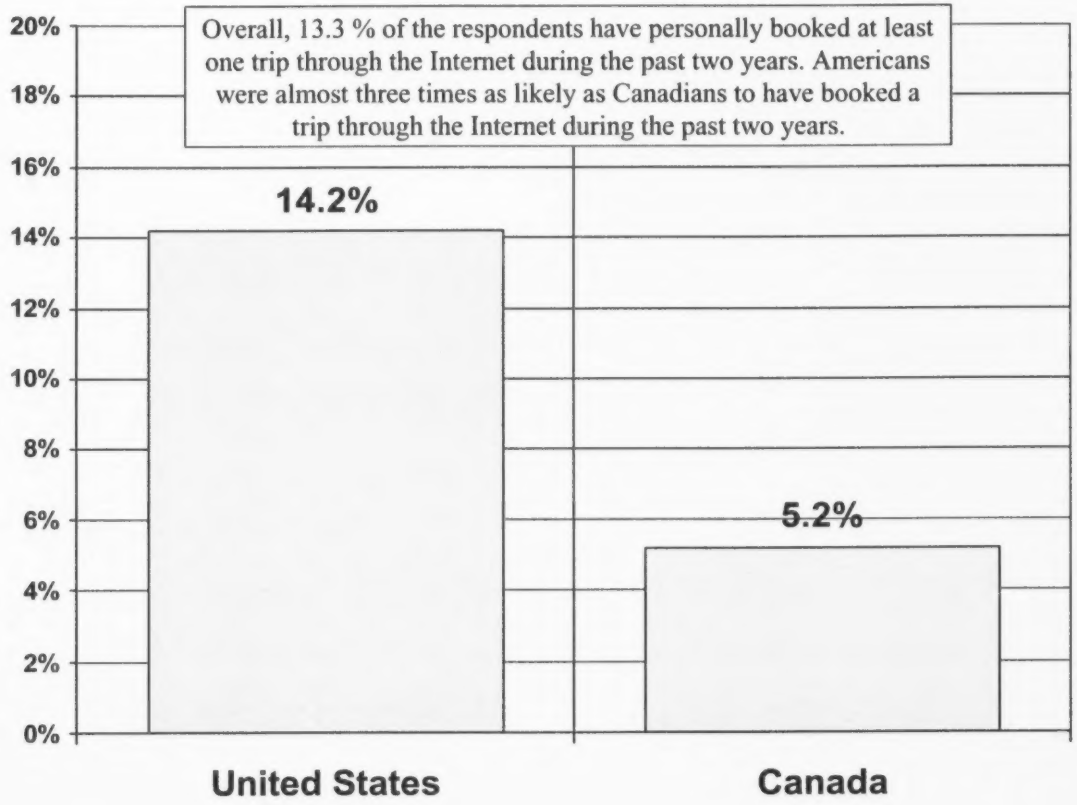


Regular use of the Internet as a source of information varied widely across the 12 market segments. The more affluent segments were clearly the most frequent users of the Internet, with little variation in usage as a function of age. However, Internet usage generally declines with age among the seven mainstream market segments.

Percent of Total Population (18 Plus)

Booking A Pleasure Trip Through The Internet

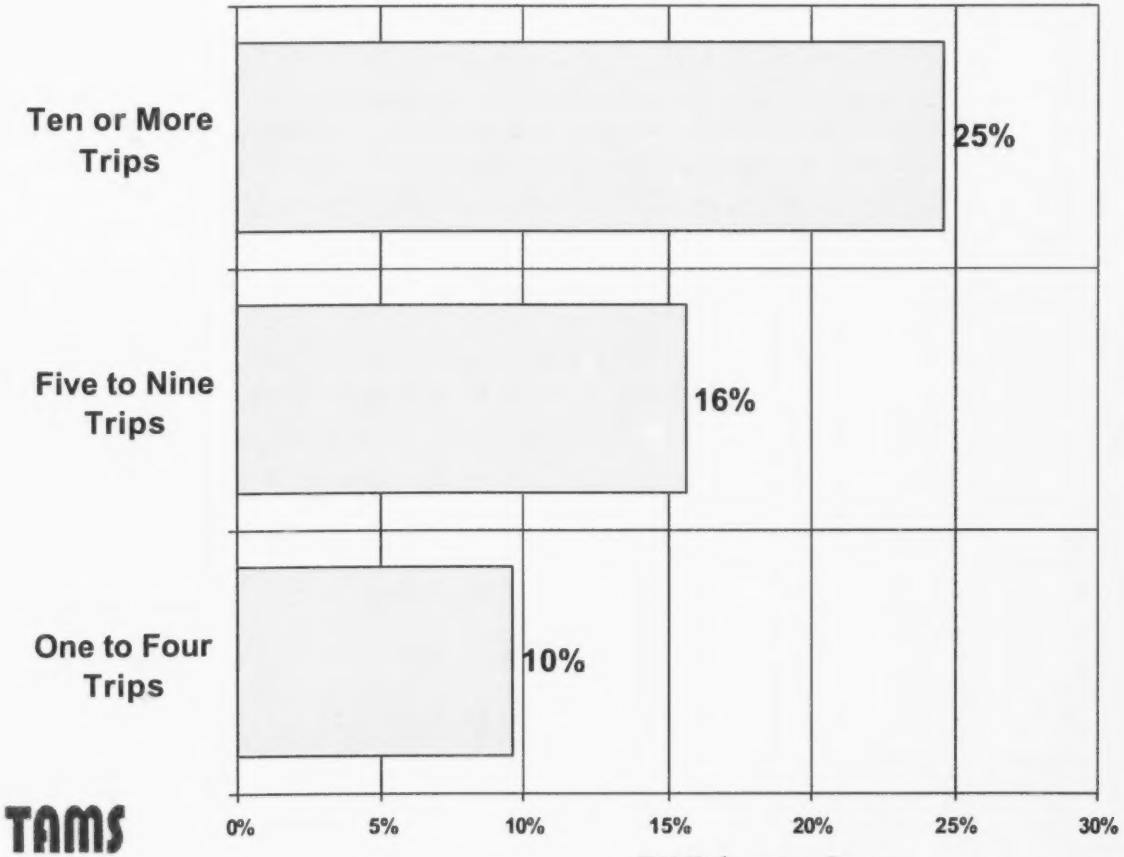
During Past Two Years: Canada versus the United States



Percent of Total Population (18 Plus) Who Have Booked A Trip Through The Internet

By Frequency of Pleasure Travel

During Past Two Years: Canada & U.S.

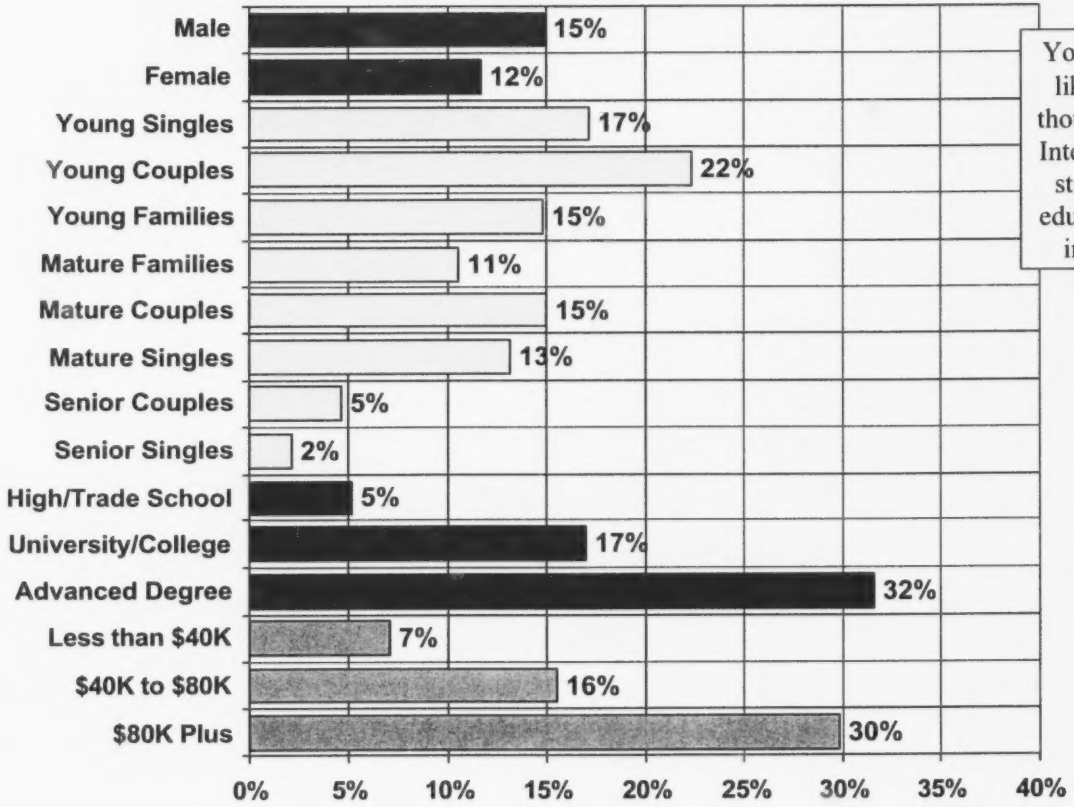


The likelihood of a trip being booked through the Internet was strongly correlated with the frequency of the respondent's pleasure travel over the last two years. This pattern may be a result of the increased convenience of the Internet for frequent travelers, as well as the increased affluence of frequent pleasure travelers.

Percent of Total Population (18 Plus) Who Have Booked A Trip Through The Internet

By Demographics

Canada and United States

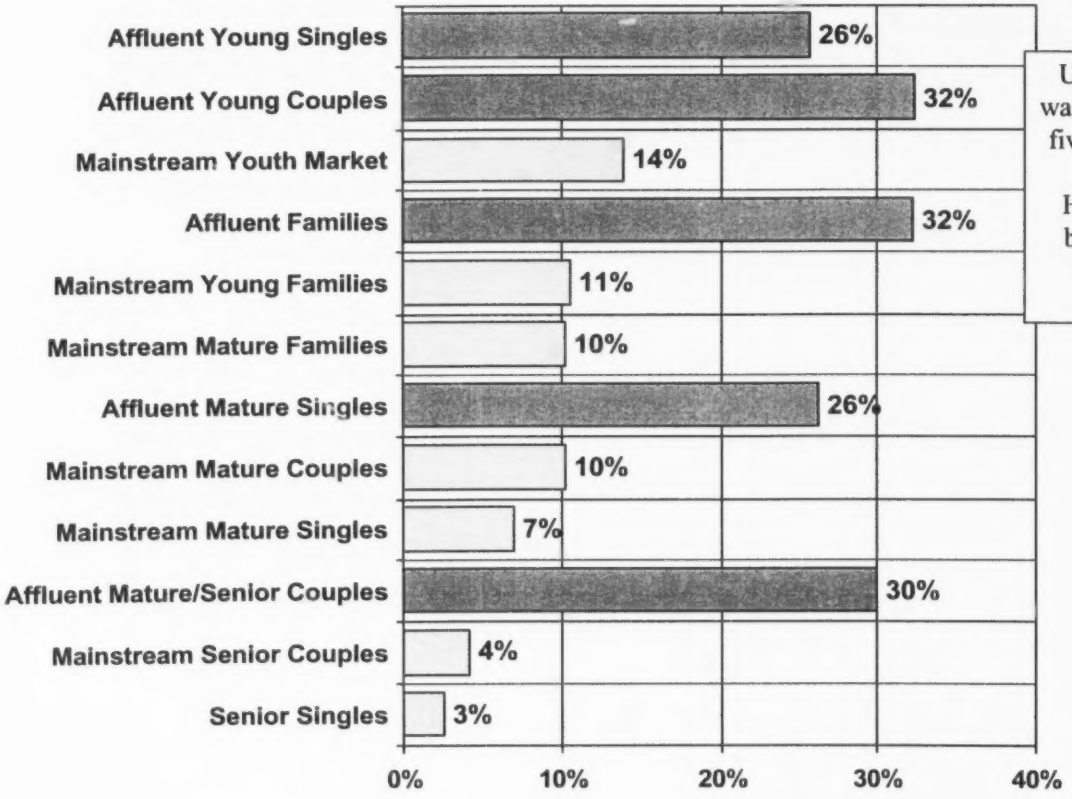


Young couples were the most likely to have booked a trip though the Internet. Use of the Internet to book trips was also strongly correlated with the education level and household income of the respondent.

Percent of Total Population (18 Plus) Who Have Booked A Trip Through The Internet

By Market Segment

Canada and United States



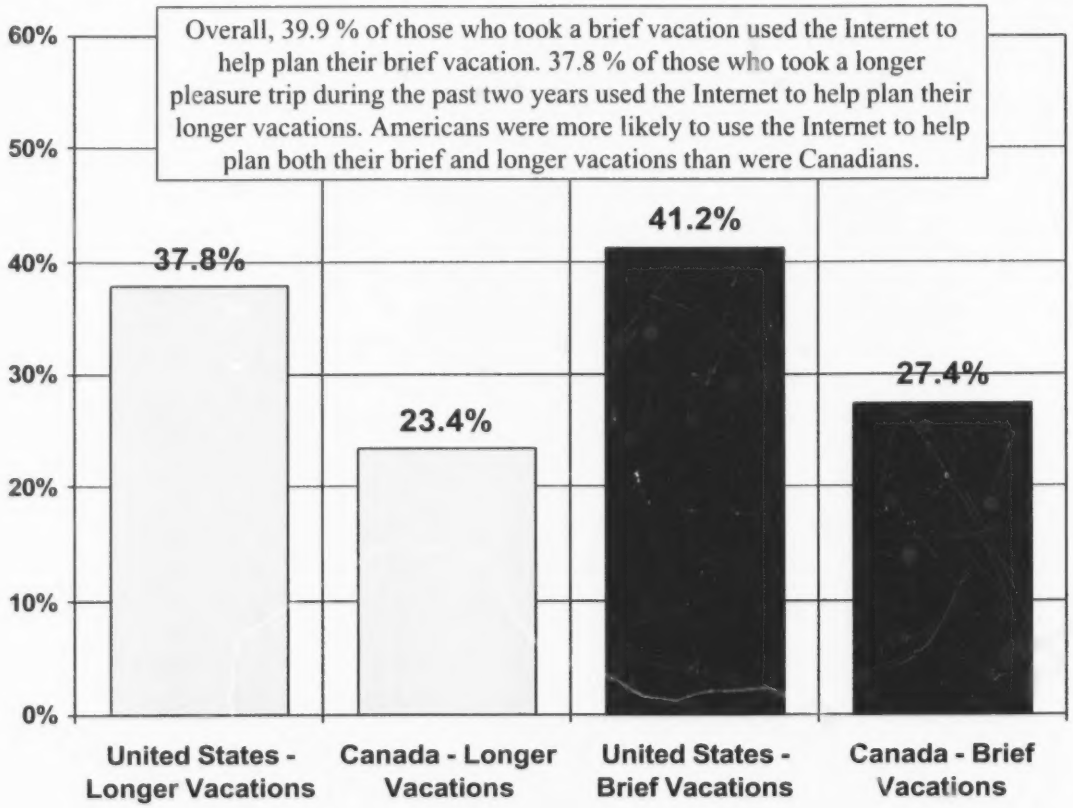
Using the Internet to book trips was clearly more likely among the five affluent segments, with little change across the lifecycle. However, using the Internet to book travel generally declined with age among the seven mainstream segments.

Percent of Total Population (18 Plus)

Using Internet To Plan Vacations

Base: Those Taking Brief or Longer Vacations During Past Two Years

Canada (n=4,685/4,498) vs. U.S. (n=5,978/5,656) (Based On Mailback Survey)

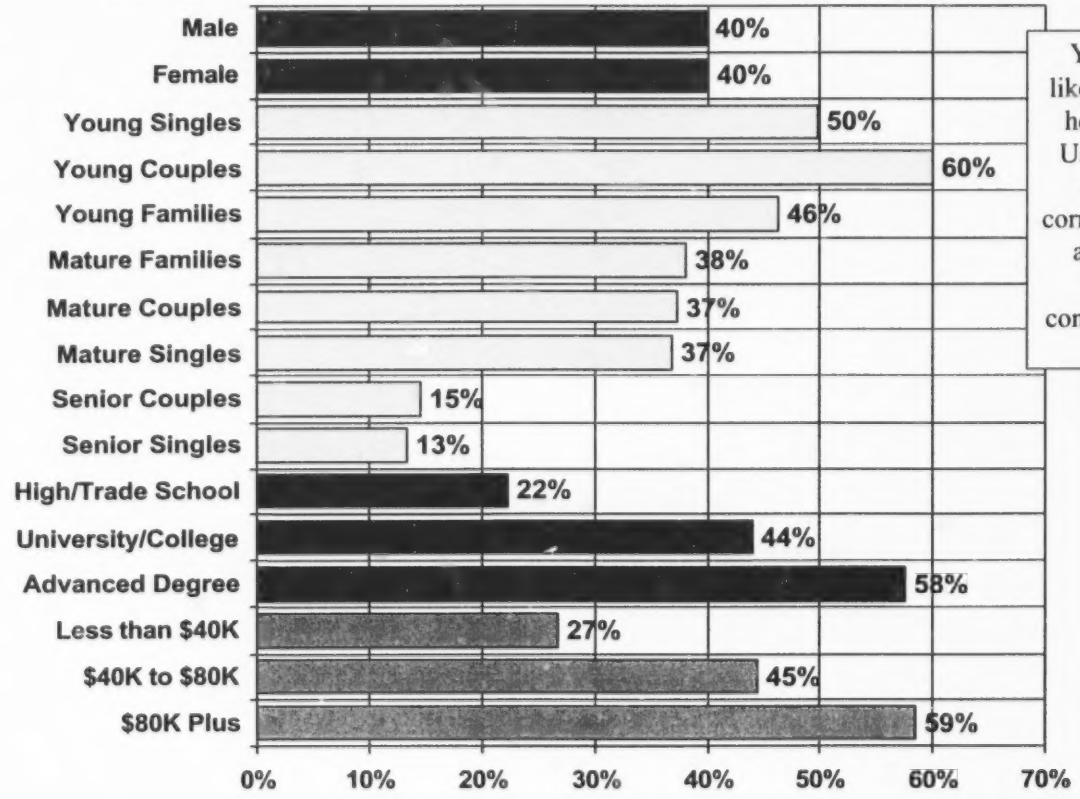


Percent of Total Population (18 Plus) Using Internet To Plan Brief Vacations

By Demographics

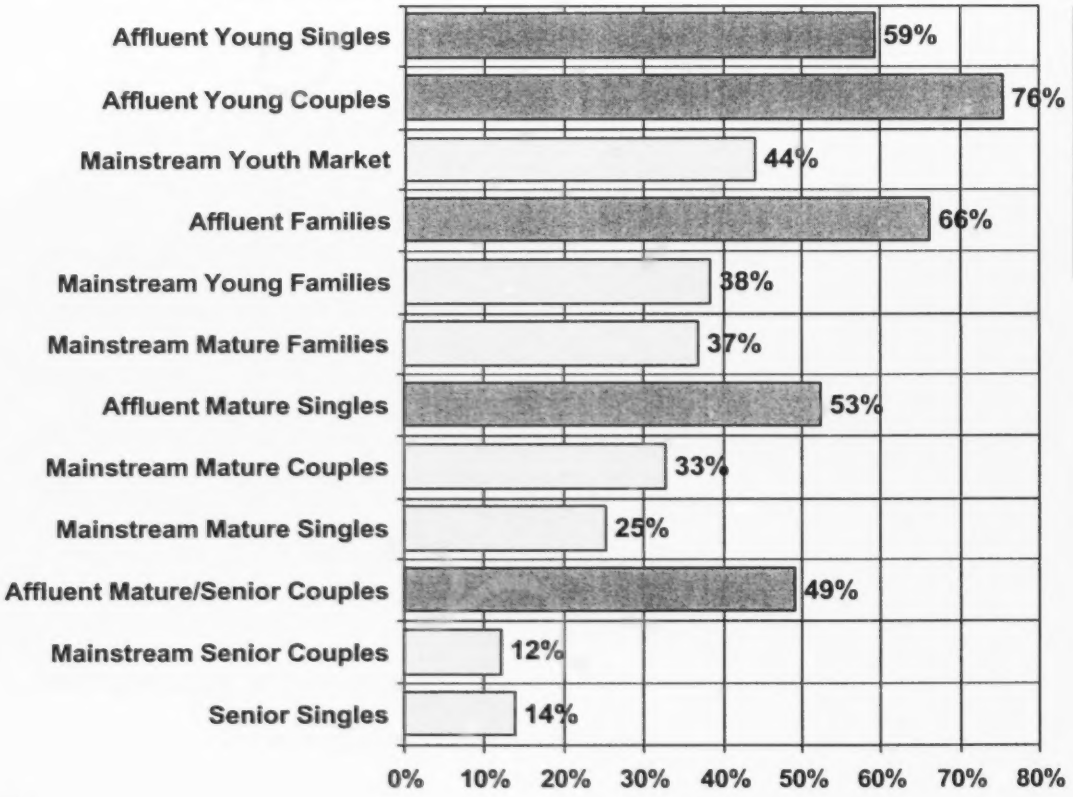
Base: Those Taking Brief Vacations During Past Two Years

Canada (n=4,685) versus U.S. (n=5,978) (Based On Mailback Survey)



Young couples were the most likely to have used the Internet to help plan their brief vacations. Use of the Internet to plan brief vacations was also strongly correlated with the education level and household income of the respondent. This pattern is consistent with the findings of the telephone survey.

Percent of Total Population (18 Plus) Using Internet To Plan Brief Vacations
By Market Segment
Base: Those Taking Brief Vacations During Past Two Years
Canada (n=4,685) versus U.S. (n=5,978) (Based On Mailback Survey)



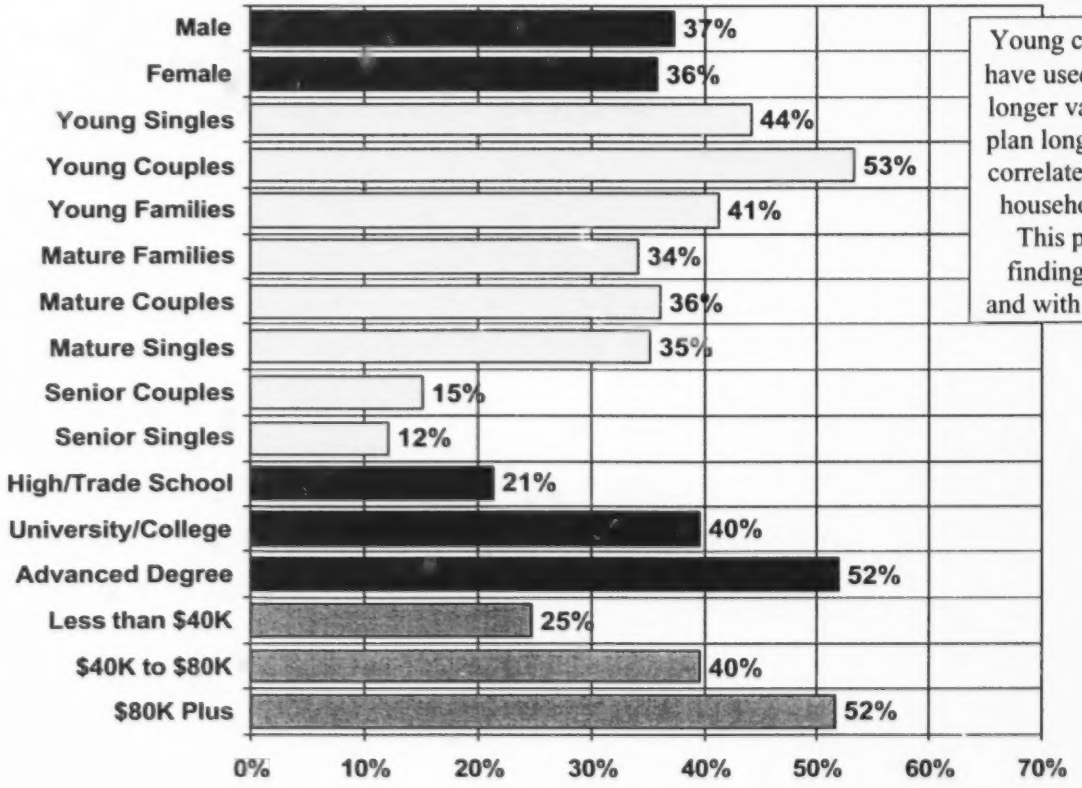
Using the Internet to help plan brief vacations was clearly more likely among the five affluent segments, and especially among younger respondents. Using the Internet to help plan brief vacations declines with age among the mainstream segments.

Percent of Total Population (18 Plus) Using Internet To Plan Longer Vacations

By Demographics

Base: Those Taking Longer Vacations During Past Two Years

Canada (n=4,498) versus U.S. (n=5,656) (Based On Mailback Survey)



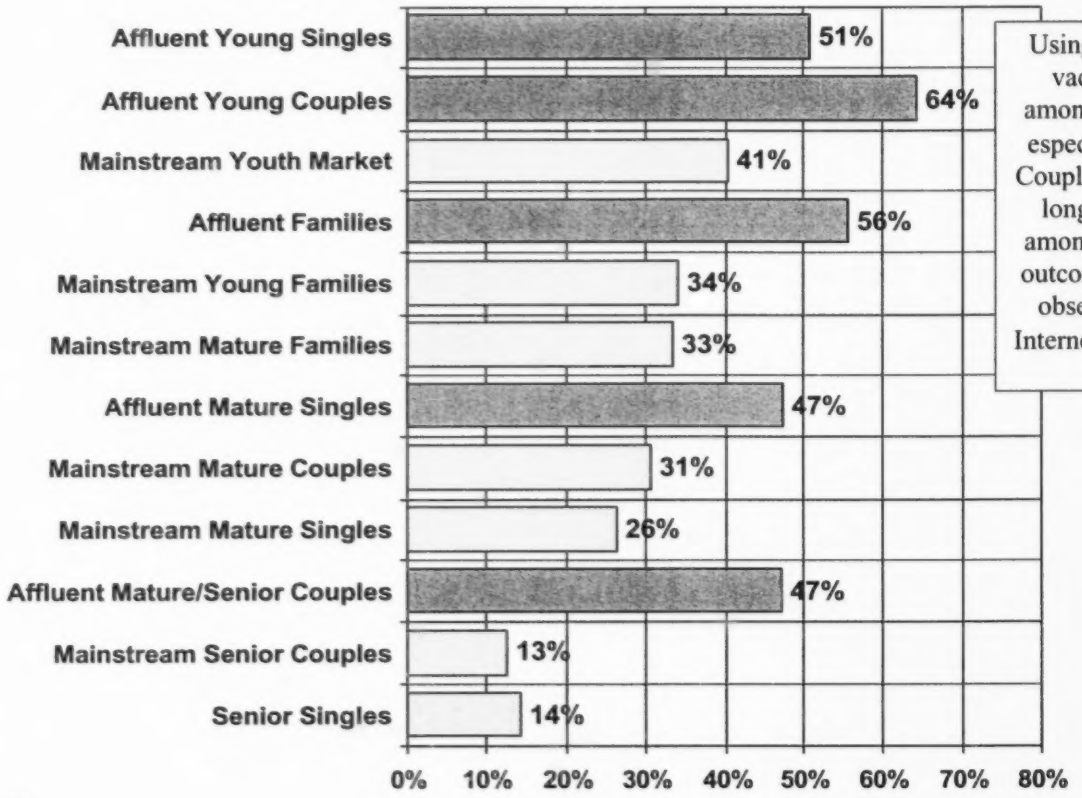
Young couples were the most likely to have used the Internet to help plan their longer vacations. Use of the Internet to plan longer vacations was also strongly correlated with the education level and household income of the respondent. This pattern is consistent with the findings for planning brief vacation and with those of the telephone survey.

Percent of Total Population (18 Plus) Using Internet To Plan Longer Vacations

By Market Segment

Base: Those Taking Longer Vacations During Past Two Years

Canada (n=4,498) versus U.S. (n=5,656) (Based On Mailback Survey)



Using the Internet to help plan longer vacations was clearly more likely among the five affluent segments, and especially among the Affluent Young Couples. Using the Internet to help plan longer vacations, declined with age among the mainstream segments. This outcome is consistent with the patterns observed for brief vacations and for Internet usage observed in the telephone survey.

Section Ten

Association Membership & Trade Show Attendance

Association Membership

- Key Findings -

Residents of the United States and Canada were most likely to belong to either an automotive association (e.g., Canadian Automobile Association, American Automobile Association) or to a sports club than any other type of association assessed.

There was a strong positive correlation between the frequency of pleasure travel and the likelihood of membership in an association. The correlation was especially strong between memberships in art galleries, museums and nature organizations and the frequency of pleasure trips. The correlation was also relatively strong between membership in automotive associations and sports clubs and the frequency of pleasure travel during the past two years.

The positive correlation between association membership and pleasure travel suggests that the magazines and newsletters distributed by such associations represent an efficient media channel by which to promote various tourism destinations.

There was a wide variation in the types of associations that each of the 12 market segments belonged to. Therefore association literature can be used strategically to efficiently reach selected sectors of the travel market.

Association Membership

- Research Method -

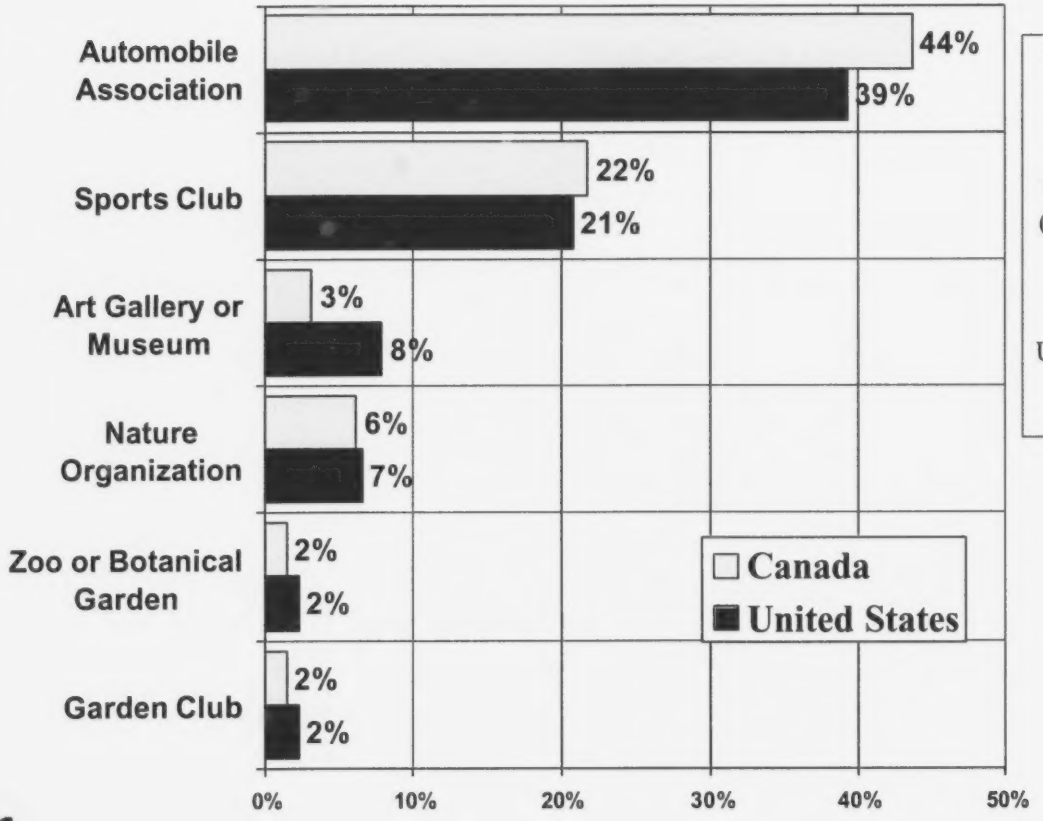
In the telephone survey, respondents were asked whether they were currently members of the following organizations:

- Automotive club such as the Canadian Automobile Association (CAA) or the American Automobile Association (AAA)
- Sports clubs such as tennis, golf, fitness centre or gym
- An art gallery or museum
- A nature organization such as the Canadian Wildlife Federation (Canada) or the Sierra Club (United States)
- A zoo or botanical garden
- A gardening club

Percent of Total Population (18 Plus)

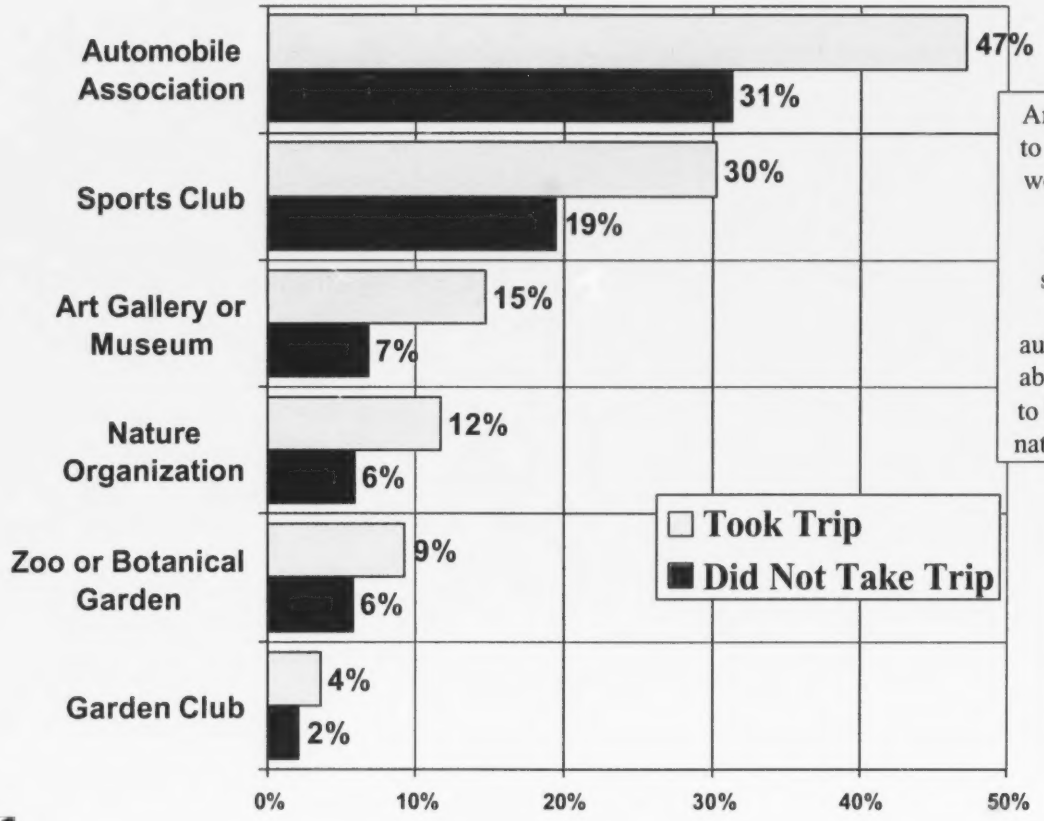
Members of Selected Associations

Canada versus the United States



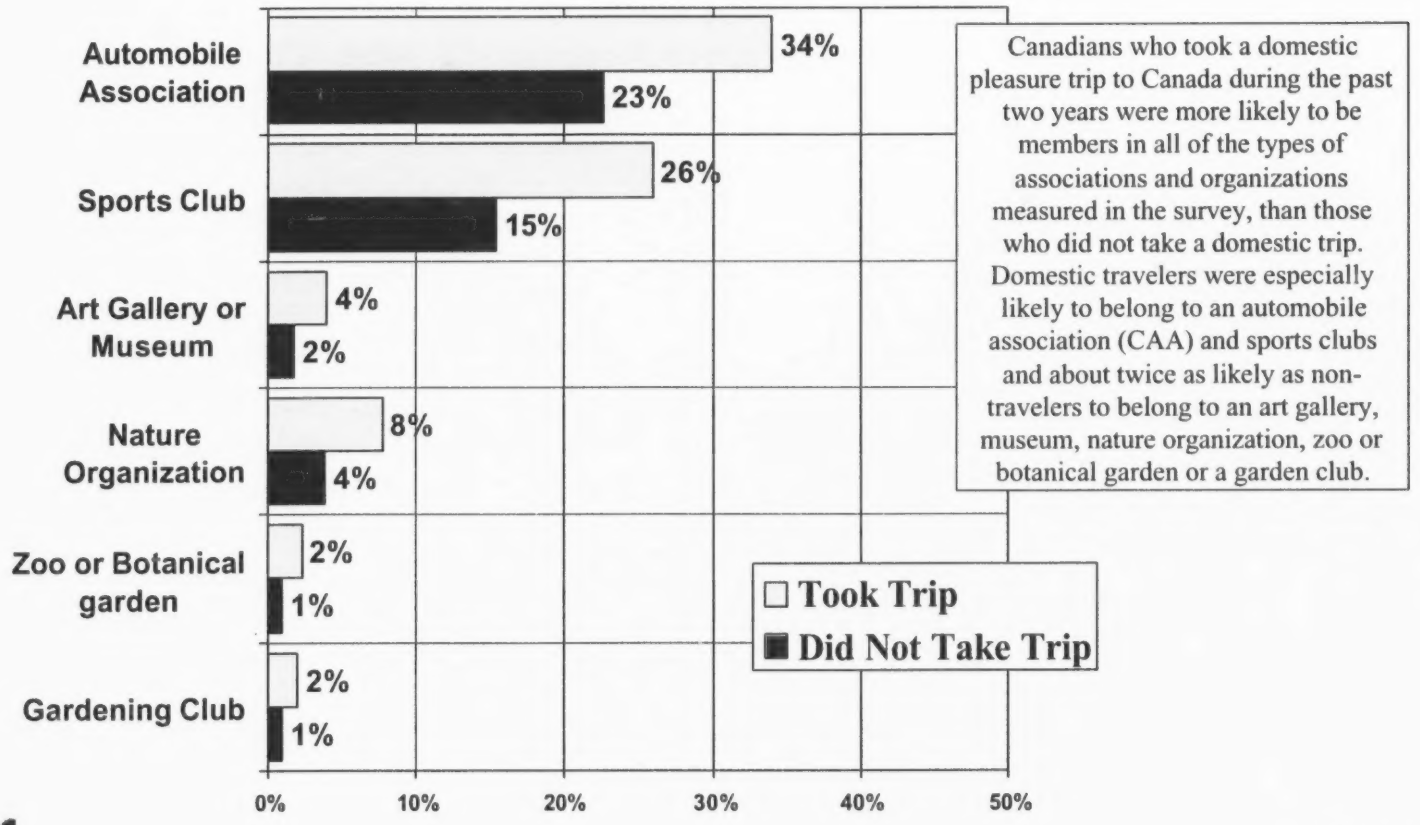
60.3 % of the total North American population (18 plus) currently belongs to at least one association. Respondents were most likely to belong to an automobile association (CAA, AAA) or a sports club. While the incidence of membership in various associations was quite consistent between Canada and the United States, Americans were more likely to belong to an art gallery or museum than were Canadians.

Percent of U.S. Population (18 Plus) Members of Various Associations
By Those Taking A Pleasure Trip To Canada Versus Those Not
Base: United States Population (18 Years and Older)



Americans who took a pleasure trip to Canada during the past two years were more likely to belong to all of the types of associations and organizations measured in the survey. Visitors to Canada were especially likely to belong to automobile associations (AAA) and about twice as likely as non-visitors to belong to an art gallery, museum, nature organization or a garden club.

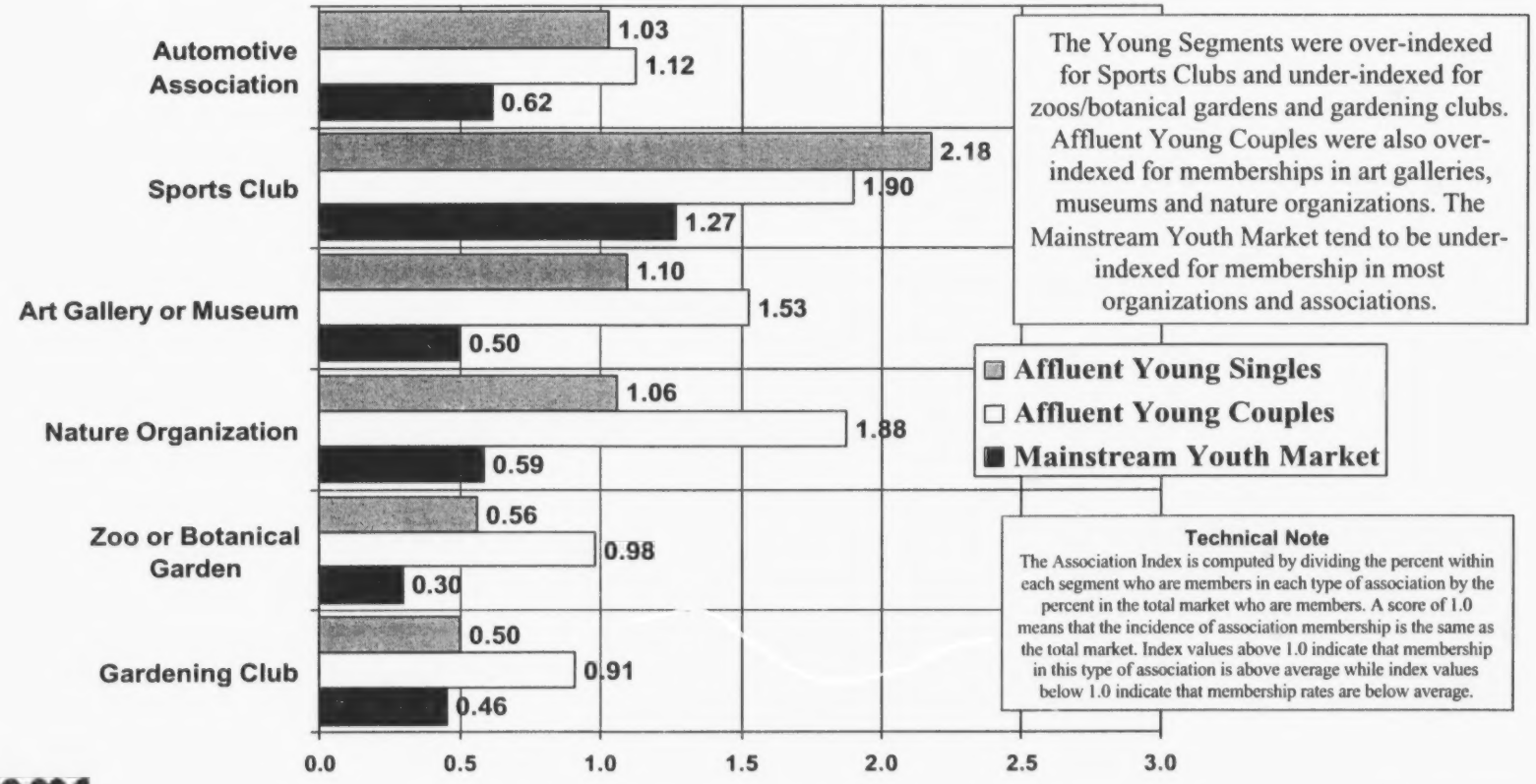
Percent of Canadian Population (18 Plus) Members of Various Associations
By Those Taking A Pleasure Trip Within Canada Versus Those Not
Base: Canada Population (18 Years and Older)



Indexing for Association Membership

Young Segments

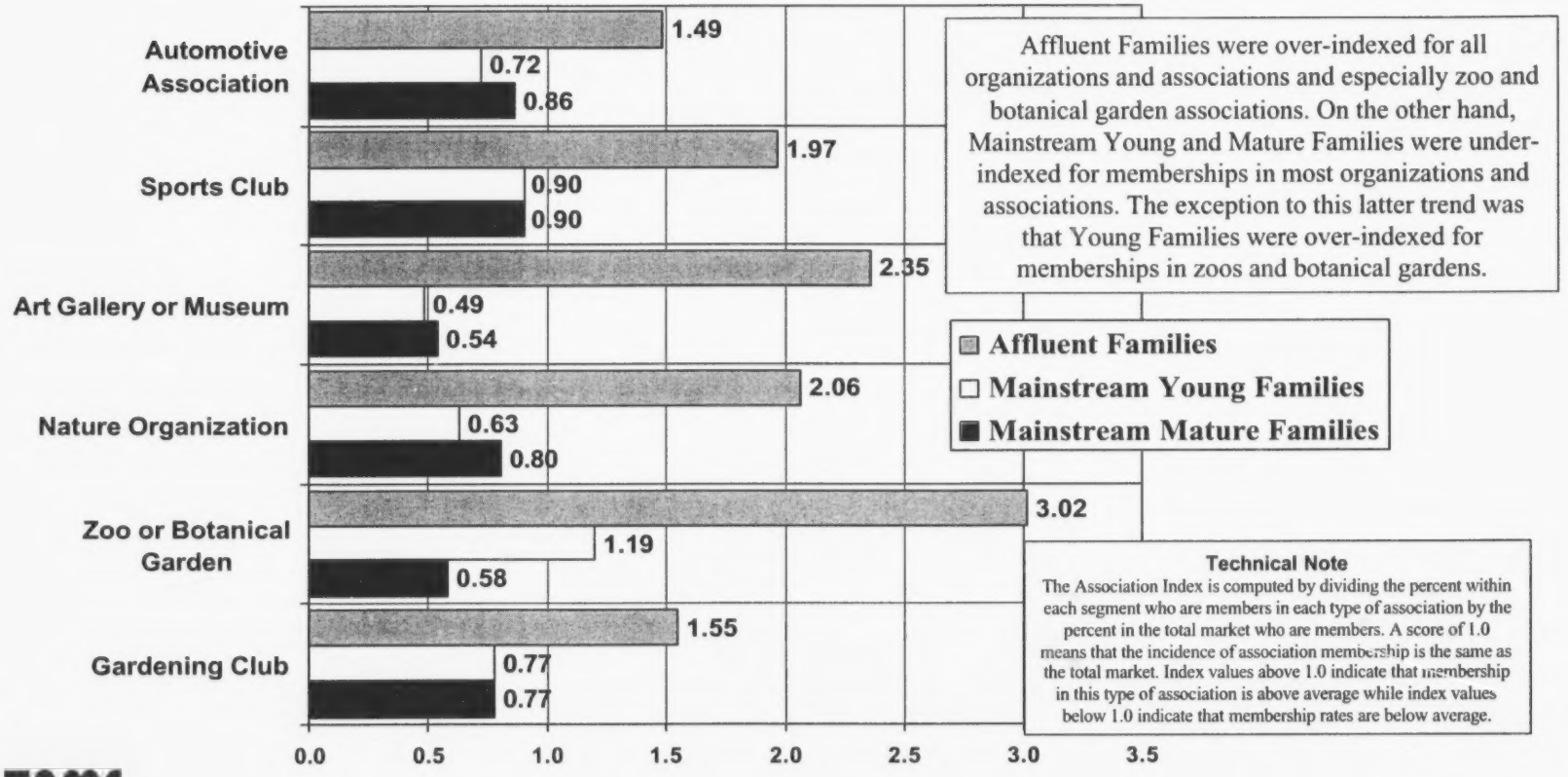
Base: Canada and U. S. Population (18 Years and Older)



Indexing for Association Membership

Family Segments

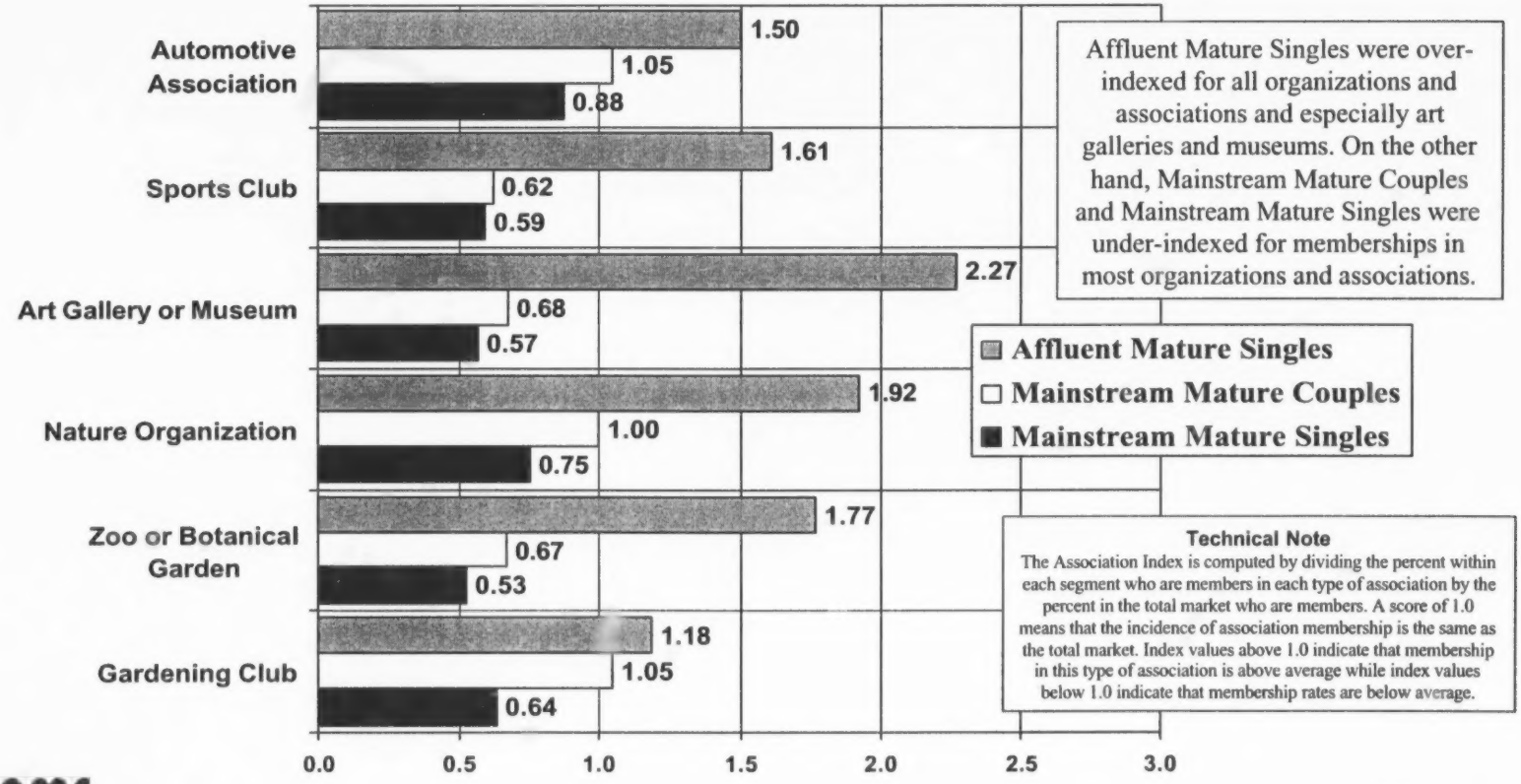
Base: Canada and U. S. Population (18 Years and Older)



Indexing for Association Membership

Mature Segments

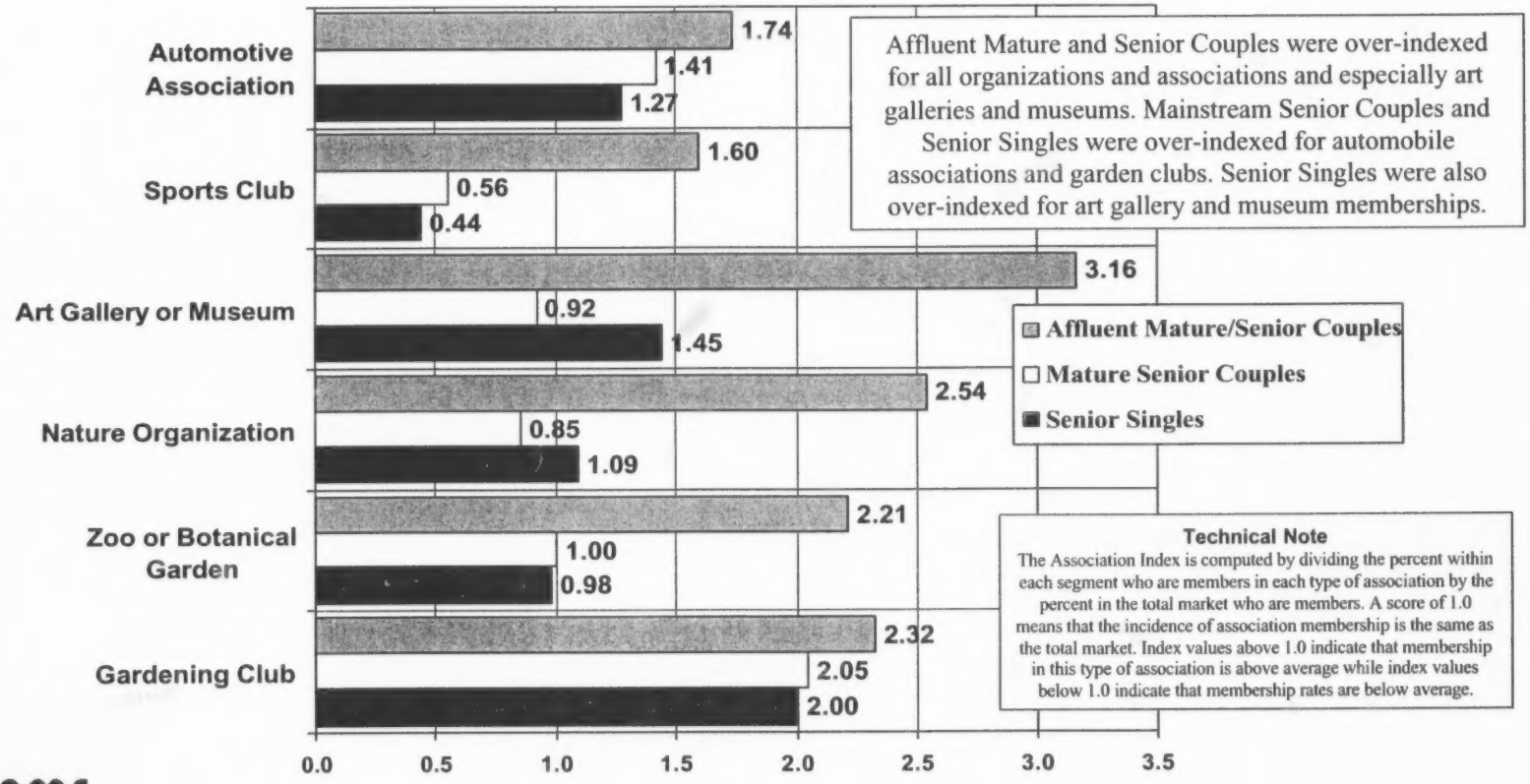
Base: Canada and U. S. Population (18 Years and Older)



Indexing for Association Membership

Mature/Senior Segments

Base: Canada and U. S. Population (18 Years and Older)



Attendance At Travel-Related Trade Shows

- Key Findings -

About one-third of U.S. and Canadian adults 18 years or older have attended at least one travel-related trade show in the last two years.

Attendance at travel-related trade shows was strongly associated with the number of pleasure trips taken in the last two years. This association was stronger for the number of domestic trips taken than for the number of trips taken to other countries, suggesting that travel-related trade shows, and especially those which feature outdoor vacations and activities (e.g., RV Campers, boat shows, sportsmen shows) may appeal more to those who prefer shorter-haul vacation travel.

The types of travel-related trade shows attended varied across the 12 market segments. For example, Affluent Young Singles were more likely to have attended boat shows and sportsmen shows while Affluent Young Couples more often attended sportsmen shows and travel shows featuring different vacations. Affluent Families were more likely to attend boat shows while Mainstream Mature Families were more likely to attend boat shows, sportsmen shows, RV or camper trade shows, and trade shows which feature different types of vacations. Affluent Mature and Senior Couples and Mainstream Mature Couples were among the most likely to attend travel-related trade shows while Mainstream Mature Singles, Mainstream Senior Couples and Senior Singles were among the least likely to have attended a trade show in the last two years.

Attendance At Travel-Related Trade Shows

- Research Method -

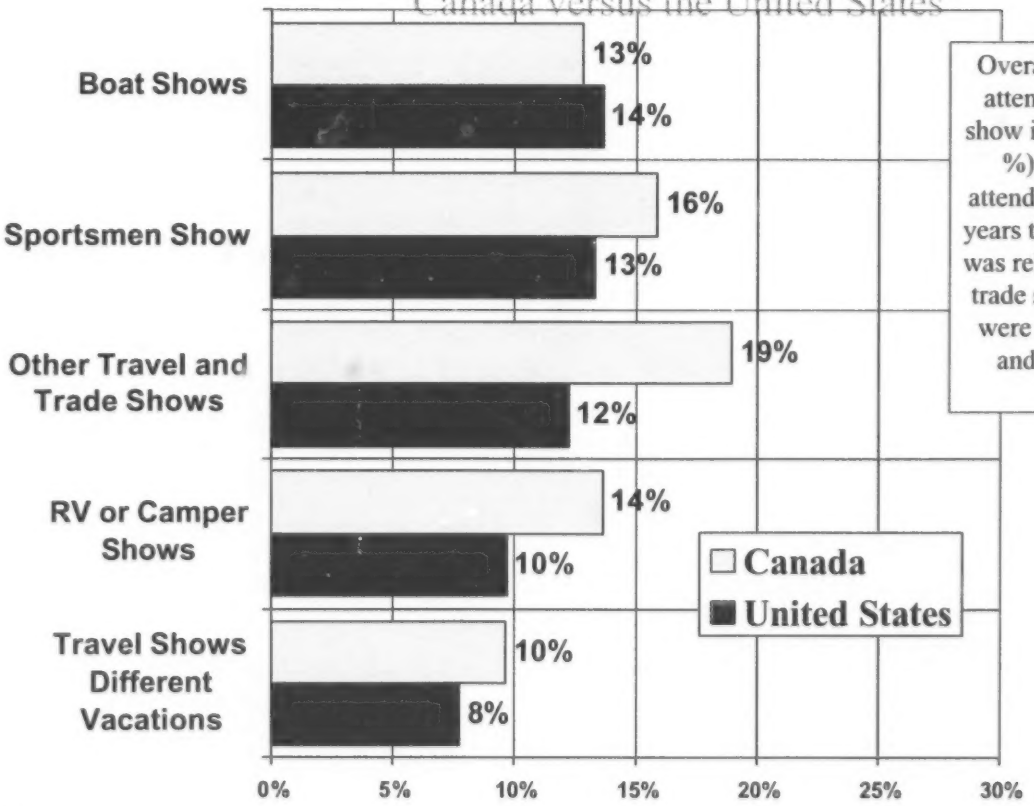
In the telephone survey, respondents were asked whether they had attended each of the following types of travel trade shows during the past two years:

- Sportsmen show including hunting and fishing
- RV or camper show
- Boat show
- Travel show for many different types of holidays and vacations
- Other travel related trade shows

Percent of Total Population (18 Plus)

Attending Travel-Related Trade Shows in Past two years

Canada versus the United States

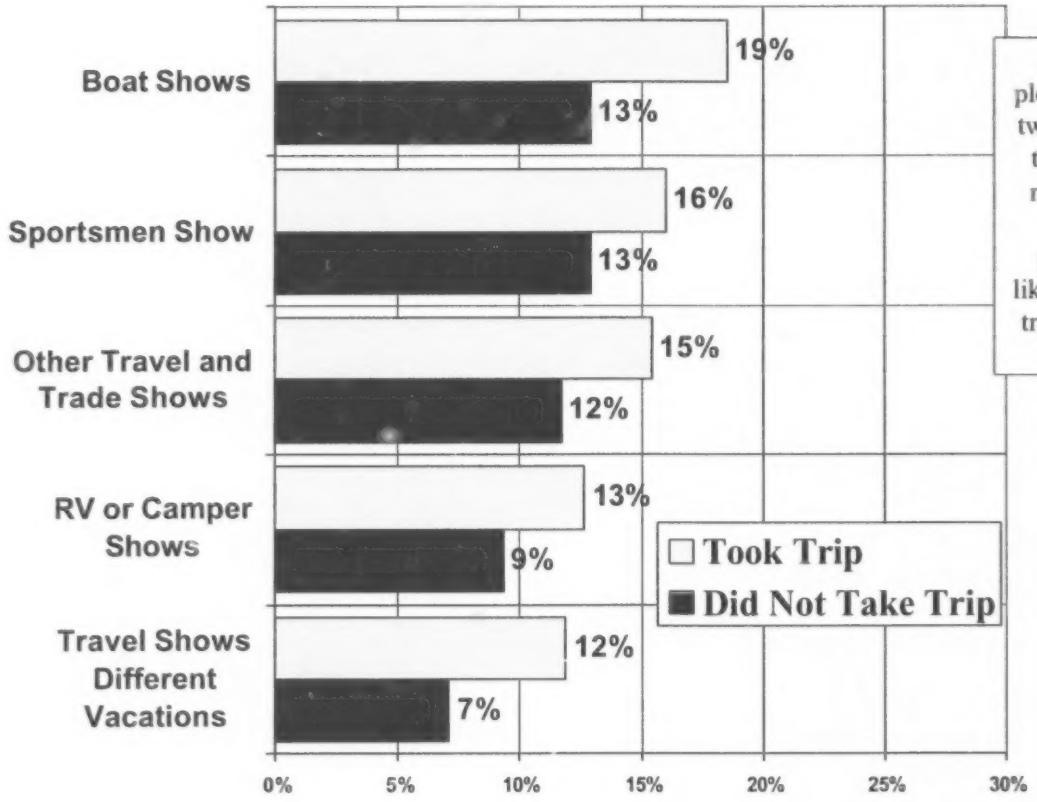


Overall, one-third of the respondents had attended at least one travel-related trade show in the last two years. Canadians (37.0 %) were slightly more likely to have attended a travel trade show in the last two years than were Americans (32.7 %). There was relatively little variation in the types of trade shows attended, although Canadians were more likely to attend "Other Travel and Trade Shows" and RVor Camper Shows."

Percent of U.S. Population (18 Plus) Attending Travel-Related Trade Shows

Those Taking A Pleasure Trip To Canada from U.S.

In Past Two Years: United States

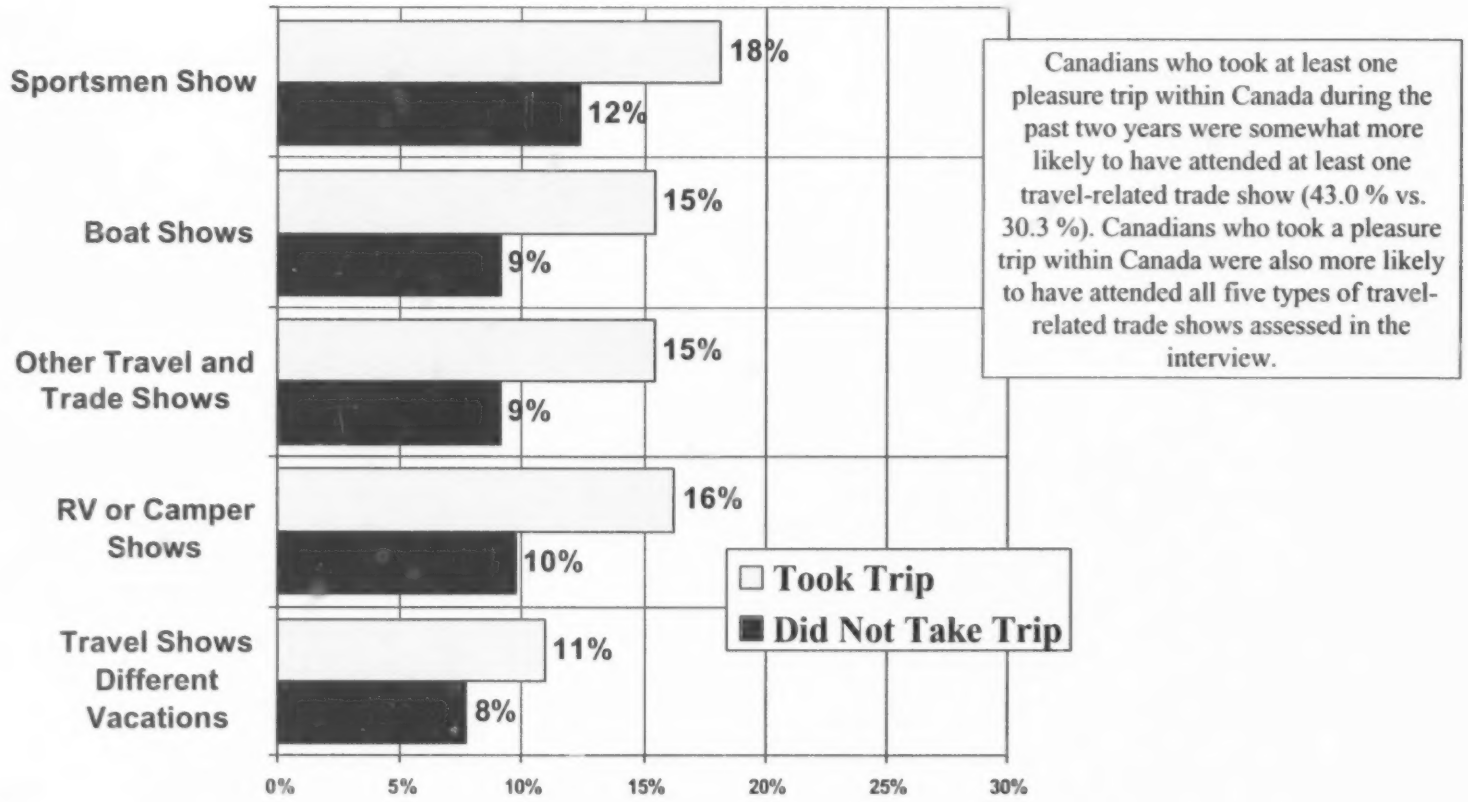


Americans who took at least one pleasure trip to Canada during the past two years were somewhat more likely to have attended at least one travel-related trade show (41.7 % vs. 31.4 %). Americans who had taken a pleasure trip to Canada were more likely to have attended all five types of travel-related trade shows assessed in the interview.

Percent of Canadian Population (18 Plus) Attending Travel-Related Trade Shows

Those Taking A Pleasure Trip Within Canada

In Past Two Years: Canada

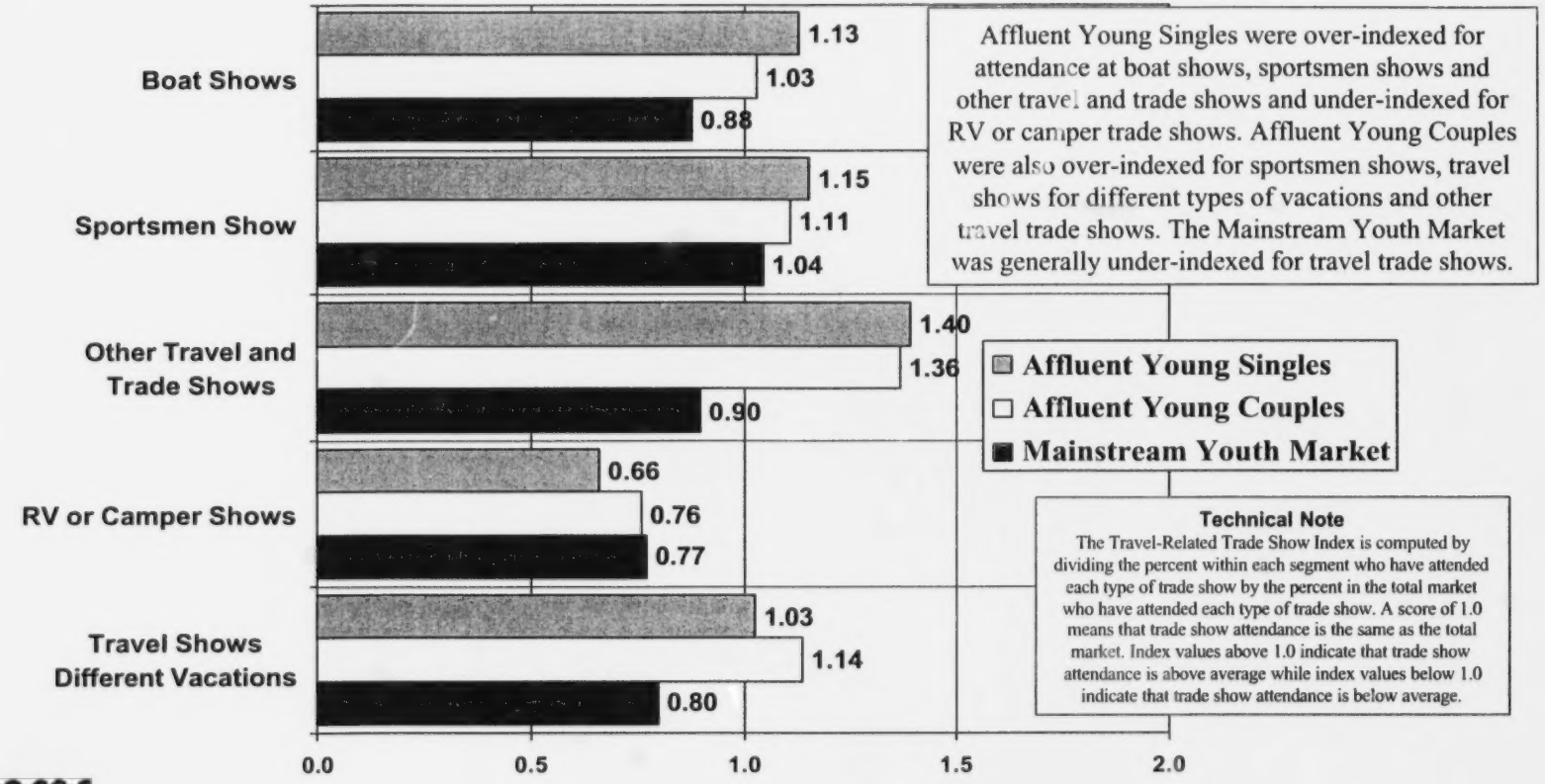


Canadians who took at least one pleasure trip within Canada during the past two years were somewhat more likely to have attended at least one travel-related trade show (43.0 % vs. 30.3 %). Canadians who took a pleasure trip within Canada were also more likely to have attended all five types of travel-related trade shows assessed in the interview.

Indexing for Travel-Related Trade Show Attendance

Young Segments

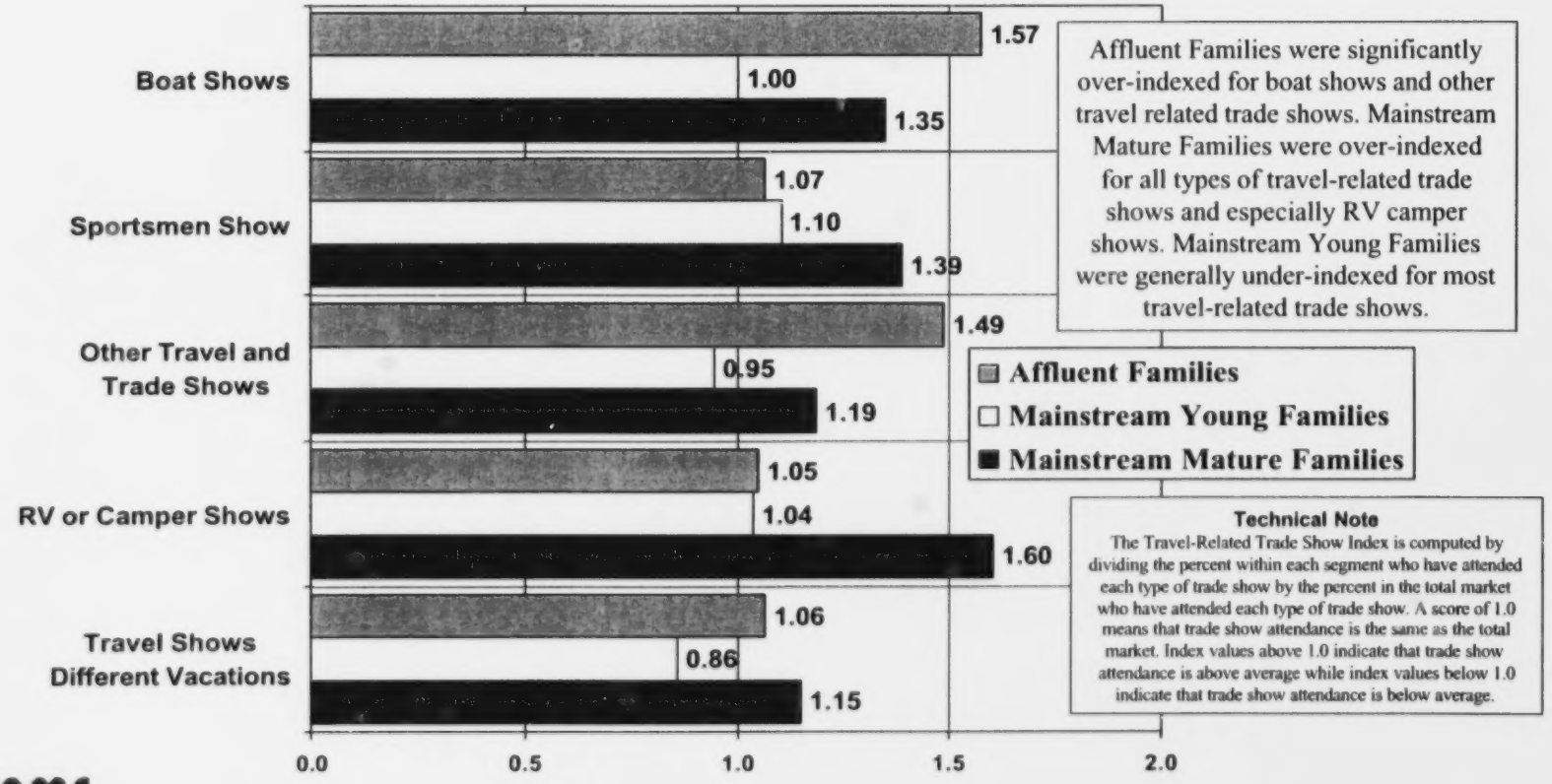
Base: Canada and U. S. Population (18 Years and Older)



Indexing for Travel-Related Trade Show Attendance

Family Segments

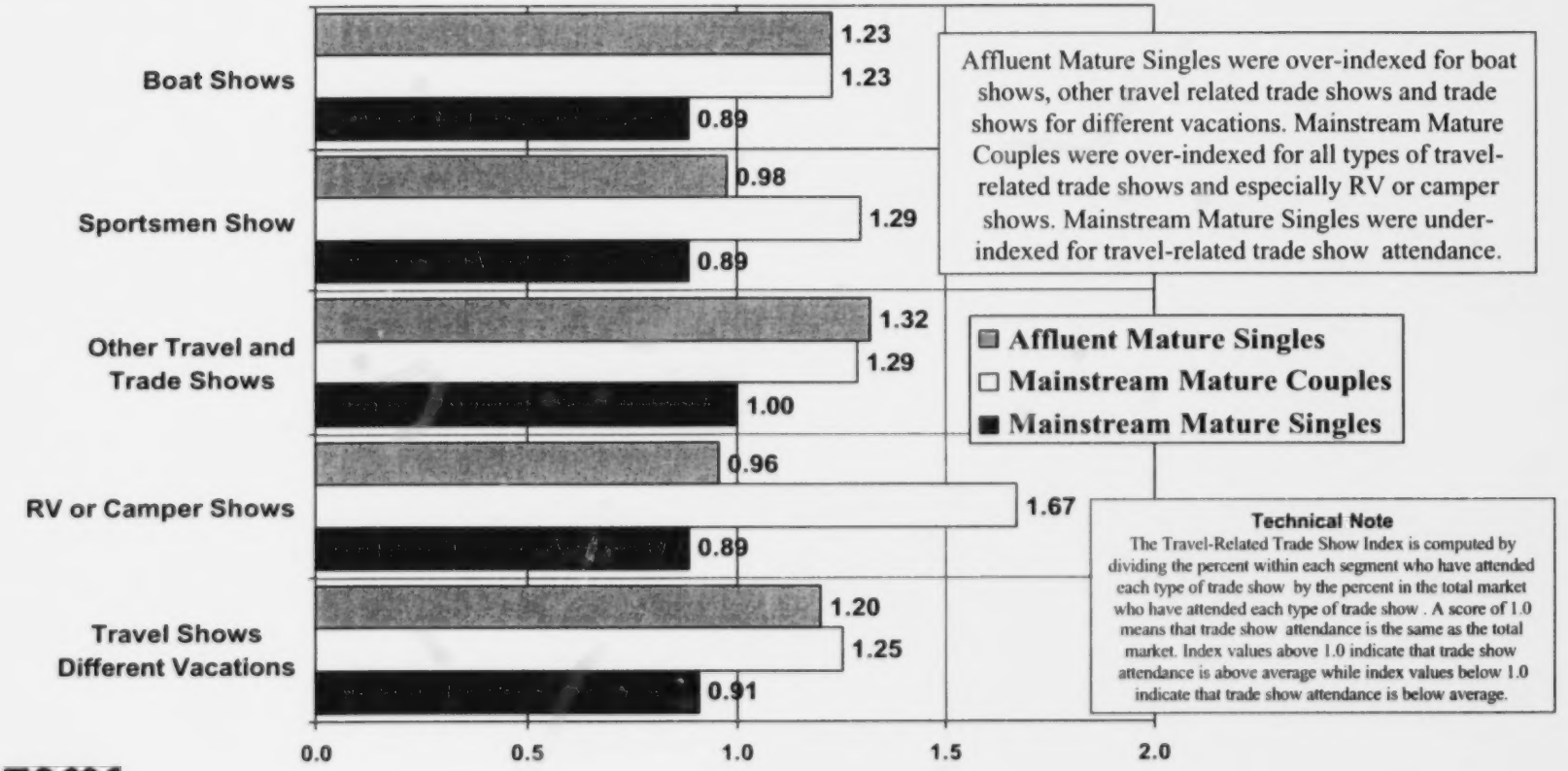
Base: Canada and U. S. Population (18 Years and Older)



Indexing for Travel-Related Trade Show Attendance

Mature Segments

Base: Canada and U. S. Population (18 Years and Older)



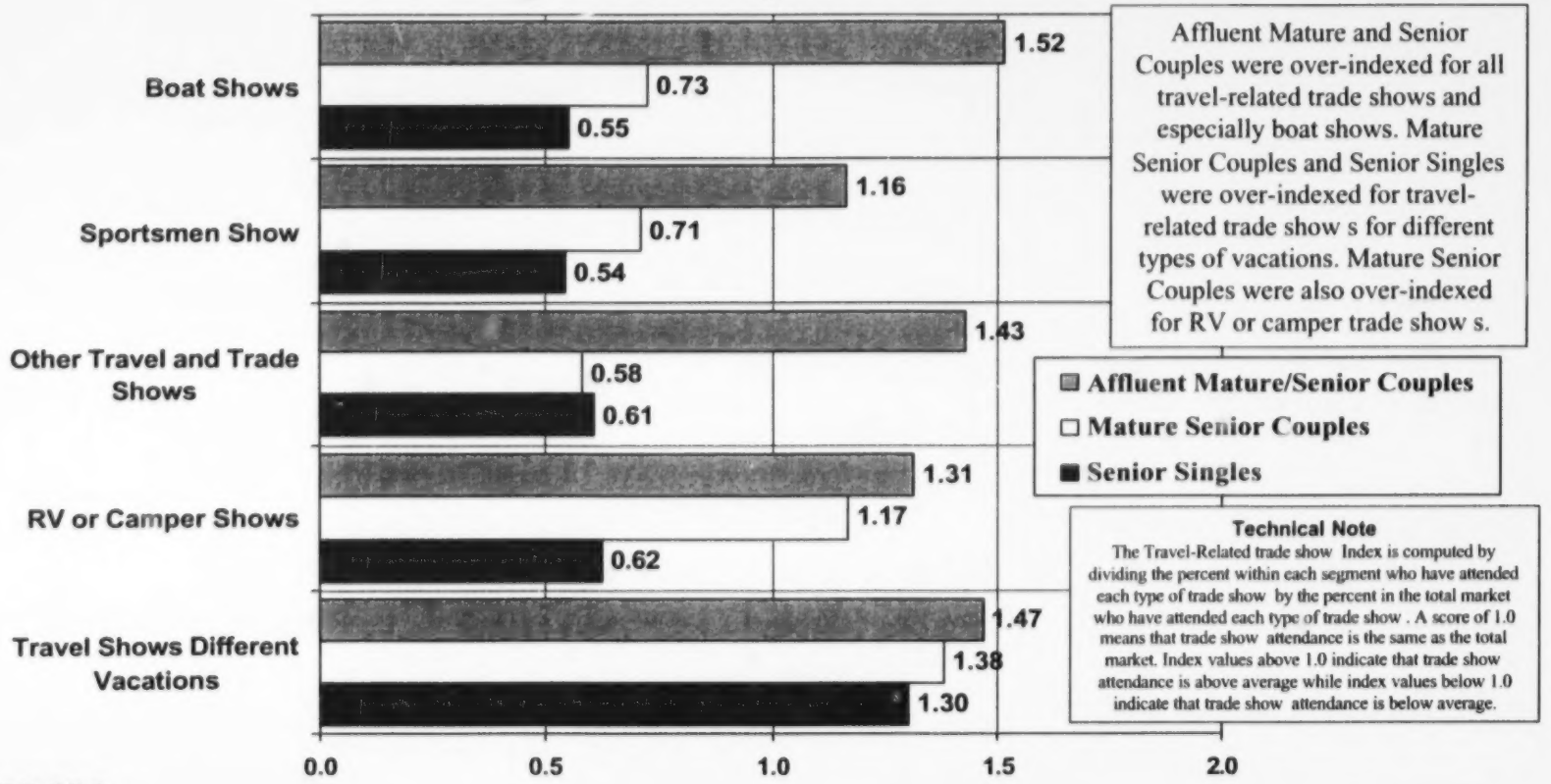
TAMS
Travel Activities & Motivations Survey

Lang

Indexing for Travel-Related trade show Attendance

Mature/Senior Segments

Base: Canada and U. S. Population (18 Years and Older)



TAMS
Travel Activities & Motivation Survey

Lang

Section Eleven

Vacation Experiences

Vacation Experiences

- Key Findings -

The most commonly sought experiences while on vacation were rest and relaxation and socializing with one's spouse or partner, family members, friends and relatives. This indicates that pleasure trips offer opportunities to recuperate from the stresses and demands of daily life, to renew the social bonds and enjoy the company of loved ones. This sort of vacation experience was especially likely to be sought by Affluent Young Couples and Affluent Families, and to a certain extent, Mainstream Young Families and Mainstream Mature Families. These sectors of the market are typically under considerable time pressures due to career and parental responsibilities and are also likely to be more focused on internal (within family) relationships.

Vacations are also frequently undertaken to see and experience natural wonders, historical sites, different and distinctive cultures and unspoiled nature. This shows that vacations provide opportunities to experience novel settings which are different from one's day to day experiences. The pursuit of exploratory vacation experiences tends to be more common as the education level and household income of the respondent increases. Affluent Mature and Senior Couples, Affluent Mature Singles, Affluent Young Couples and Affluent Families were especially likely to seek out these sorts of vacation experiences.

Vacations were less frequently undertaken to indulge and pamper oneself. Thus, respondents were less likely to have taken pleasure trips to experience "the good life"(e.g., fine cuisine, pamper oneself), visit casinos, experience city life (e.g., shopping, nightlife) or visit a trendy, popular place. However, this sort of vacation experience clearly appeals to younger travelers such as the Affluent Young Singles, the Affluent Young Couples and the Mainstream Youth Market.

Vacations are also often undertaken to learn or improve oneself through educational, hands-on experiences, or to participate in a particular hobby or sport. This sort of vacation experience was more likely to be sought out by Affluent Young Singles and the Mainstream Youth Market.

There is also considerable consistency in the vacation experiences sought in the last two years, and the types of vacation experiences that will be sought in the next two years. However, vacationers were more likely to want natural and historical sites, adventure and excitement and unspoiled nature during the next two years, relative to the past two years. Vacationers were also more likely to look for intimacy and romance, different cultures and ways of life, to experience the "good life" and seek out hands-on learning experience during the next two years. Vacationers also agreed that they are more likely to take a vacation to escape the winter weather over the next two years than they did in the past two years.

Vacation Experiences

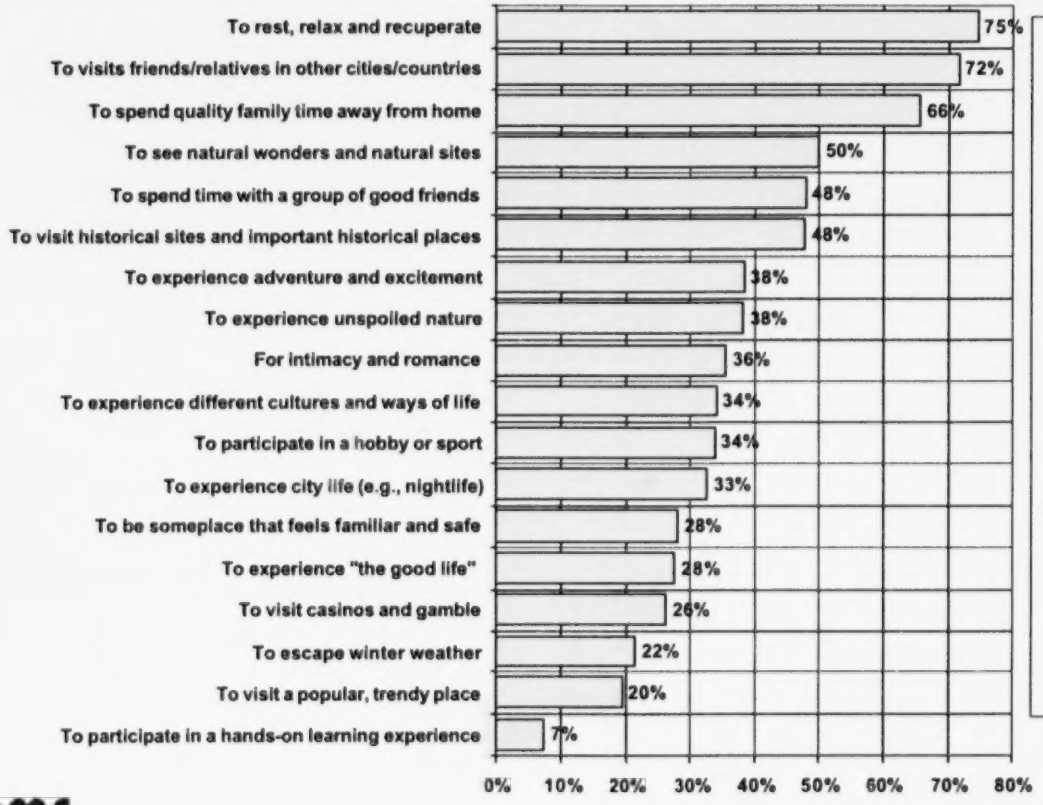
- Research Method -

The first portion of the mailback survey asked those who had taken a trip during the past two years to indicate which of following vacation experiences they had sought over the course of the last two years of pleasure travel:

- To rest, relax and recuperate
- To spend quality time with the family away from home
- To visit friends or relatives who live in another city or country
- For intimacy and romance
- To experience different cultures and ways of life
- To visit historical sites and important places in history
- To spend time with a group of good friends
- To see natural wonders and important natural sites
- To experience "the good life" - fine cuisine, good wine, being pampered
- To visit casinos and gamble
- To visit a popular, trendy place
- To be someplace that feels familiar and safe
- To experience adventure and excitement
- To experience city life (e.g., nightlife, shopping, museums)
- To escape winter weather
- To experience unspoiled nature
- To participate in a hobby or sport (e.g., golf, fishing, photography)
- To participate in a hands-on learning experience (e.g., archaeological digs, cooking courses)

Vacation Experiences Sought
During Pleasure Travel in the Past two years

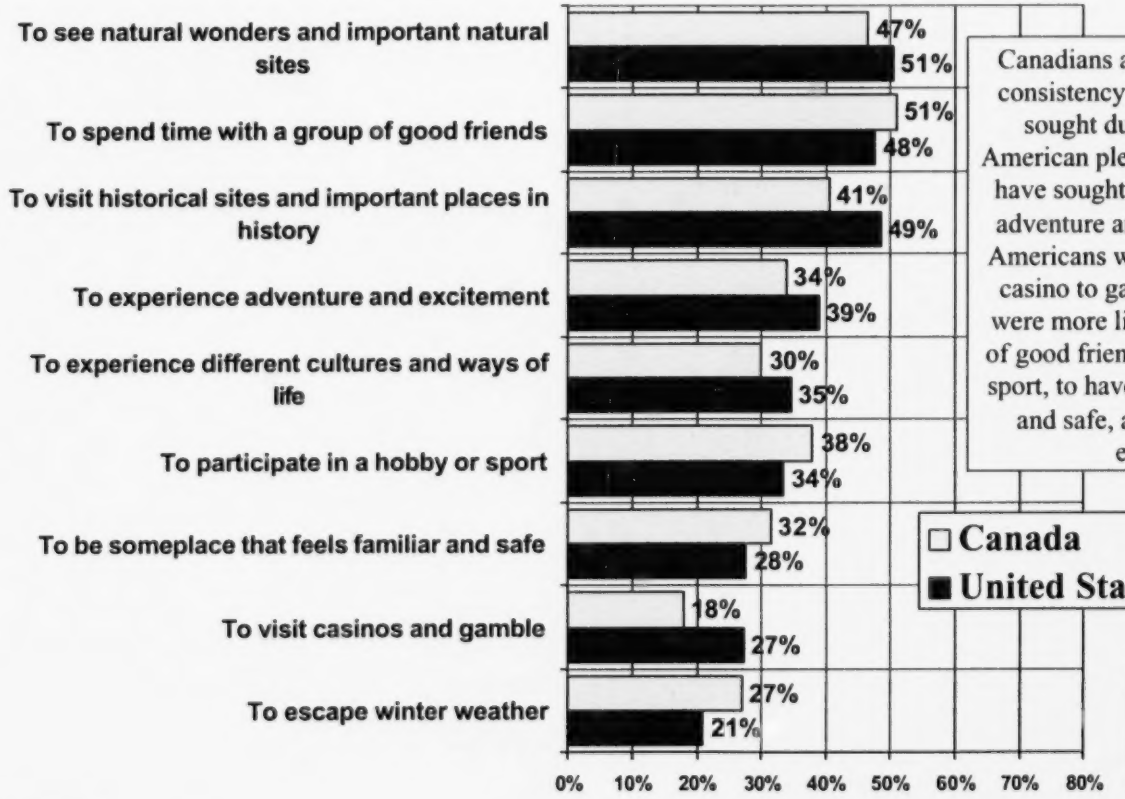
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Pleasure vacationers were most likely to have sought rest and relaxation, to have visited family and friends in other cities or countries, or to have spent quality time with their families away from home. Seeing natural and historical sites and nature wonders, and spending time with good friends, were also frequently pursued vacation experiences. Between 33 % and 40 % had taken vacations to experience unspoiled nature, for adventure & excitement, for intimacy & romance, to experience different cultures or ways of life, to experience city life or to pursue a particular hobby or sport. Vacationers were less likely to have sought familiar and safe places, to have experienced the good life, to visit a casino and gamble, to escape the winter weather, to visit a popular trendy place, or to have sought out a learning experience while on vacation.

Difference in Vacation Experiences Sought By Canadians and Americans During Pleasure Travel

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

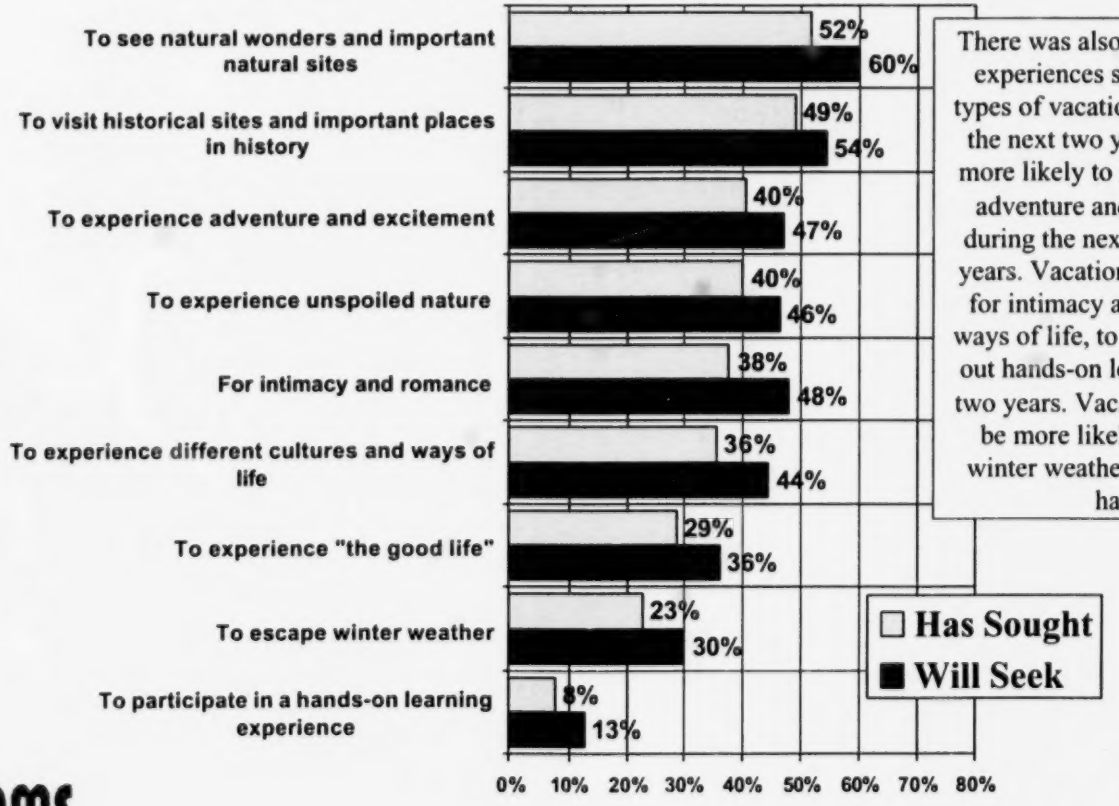


Canadians and Americans exhibited remarkable consistency in the types of vacation experiences sought during the past two years. However, American pleasure vacationers were more likely to have sought out natural wonders, historical sites, adventure and excitement and different cultures. Americans were also more likely to have visited a casino to gamble. On the other hand, Canadians were more likely to have spent time with a group of good friends, to have participated in a hobby or sport, to have sought out a place that was familiar and safe, and to have taken a pleasure trip to escape the winter weather.

Technical Note
Only differences in the vacation experiences sought by Canadians and Americans have been shown in this chart.

Vacation Experiences Sought versus Vacation Experiences Will Seek

Base: Percent of Population (18 Plus) Who Took a Trip in the Last Two Years or Plan to Take A Trip in the Next Two Years: Canada & U.S. (Mailback Survey)



There was also a list of consistency in the vacation experiences sought in the last two years and the types of vacation experiences that will be sought in the next two years. However, vacationers will be more likely to seek out natural and historical sites, adventure and excitement and unspoiled nature during the next two years, relative to the past two years. Vacationers will also be more likely to look for intimacy and romance, different cultures and ways of life, to experience the "good life" and seek out hands-on learning experiences during the next two years. Vacationers also agreed that they would be more likely to take a vacation to escape the winter weather over the next two years than they had in the past two years.

Technical Note

Only differences in the vacation experiences sought and the vacation experiences that will be sought have been shown in this chart.

Factor Analysis of Vacation Experiences Sought

The vacation experiences sought in the last two years were submitted to a factor analysis to identify underlying vacation experiences sought in pleasure travel. Factor analysis is a statistical technique which uses the association between individual responses to generate more general (or abstract) measures of the vacation experiences sought. The factors may be used to generate factor scores which reflect the general vacation experiences sought. This analysis identified the following five vacation experience factors:

Exploration

- To visit historical sites and important places in history
- To see natural wonders and important natural sites
- To experience different cultures and ways of life
- To experience unspoiled nature

Personal Indulgence

- To visit a popular, trendy place
- To visit casinos and gamble
- To experience "the good life"(e.g., fine cuisine, being pampered
- To experience city life (e.g., nightlife, shopping, museums)

Factor Analysis of Vacation Experiences Sought (Continued)

Romance & Relaxation

- To rest, relax and recuperate
- For intimacy and romance
- To spend quality time with the family away from home

Sports, Hobbies & Learning

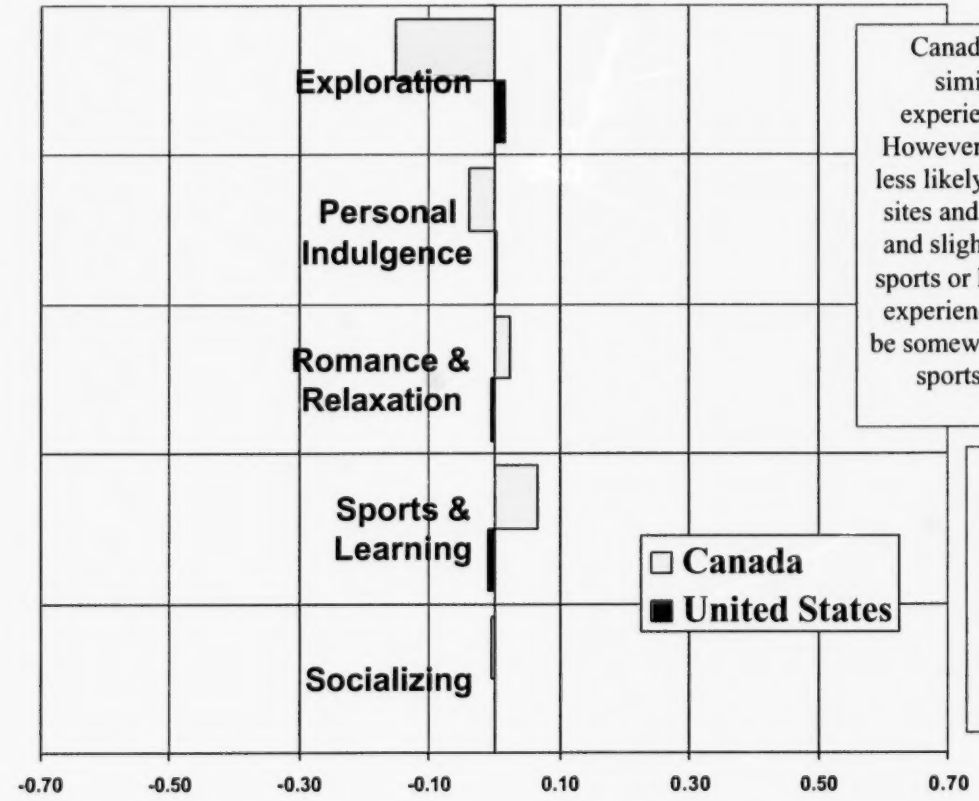
- To participate in a hobby or sport (e.g., golf, fishing, photography)
- To participate in a hands-on learning experience (e.g., archaeological digs, cooking courses)

Socializing

- To visit friends or relatives who live in another city or country
- To spend time with a group of good friends
- To be someplace that feels familiar and safe

General Vacation Experiences Sought
During Pleasure Travel in the Past two years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Canadians and Americans were remarkably similar in terms of the general vacation experiences sought during the past two years. However, relative to Americans, Canadians were less likely to have explored (e.g., visited historical sites and natural wonders) during their vacations and slightly more likely to have participated in a sports or hobby, or sought out a hands-on learning experience. This suggests that Canadians tend to be somewhat less exploratory, and somewhat more sports and hobby oriented in their vacation pursuits than Americans.

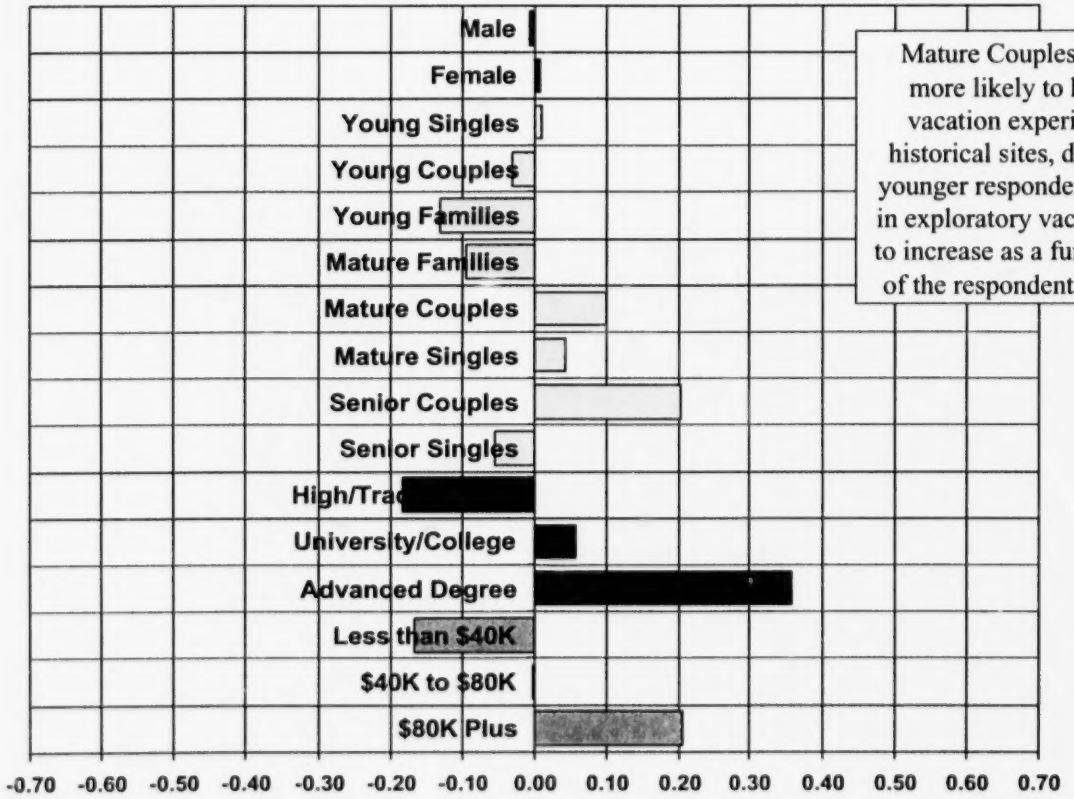
Technical Note

The factor scores for each dimension is determined by the weighted sum of all items. The weighting is determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

General Vacation Experiences Sought in Past Two Years

Exploration

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

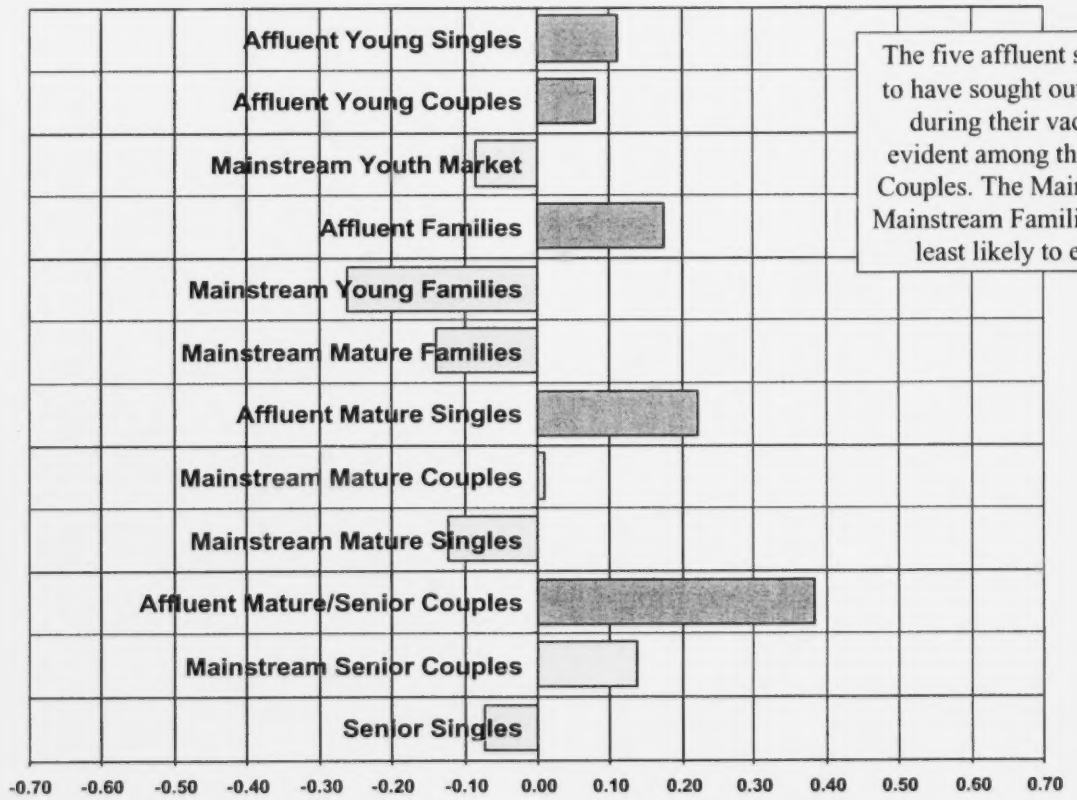


Mature Couples and Senior Couples were more likely to have pursued exploratory vacation experiences (seeing natural and historical sites, different cultures) than were younger respondents and families. An interest in exploratory vacation experiences also tends to increase as a function of the education level of the respondent and the household income.

General Vacation Experiences Sought in Past Two Years

Exploration

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

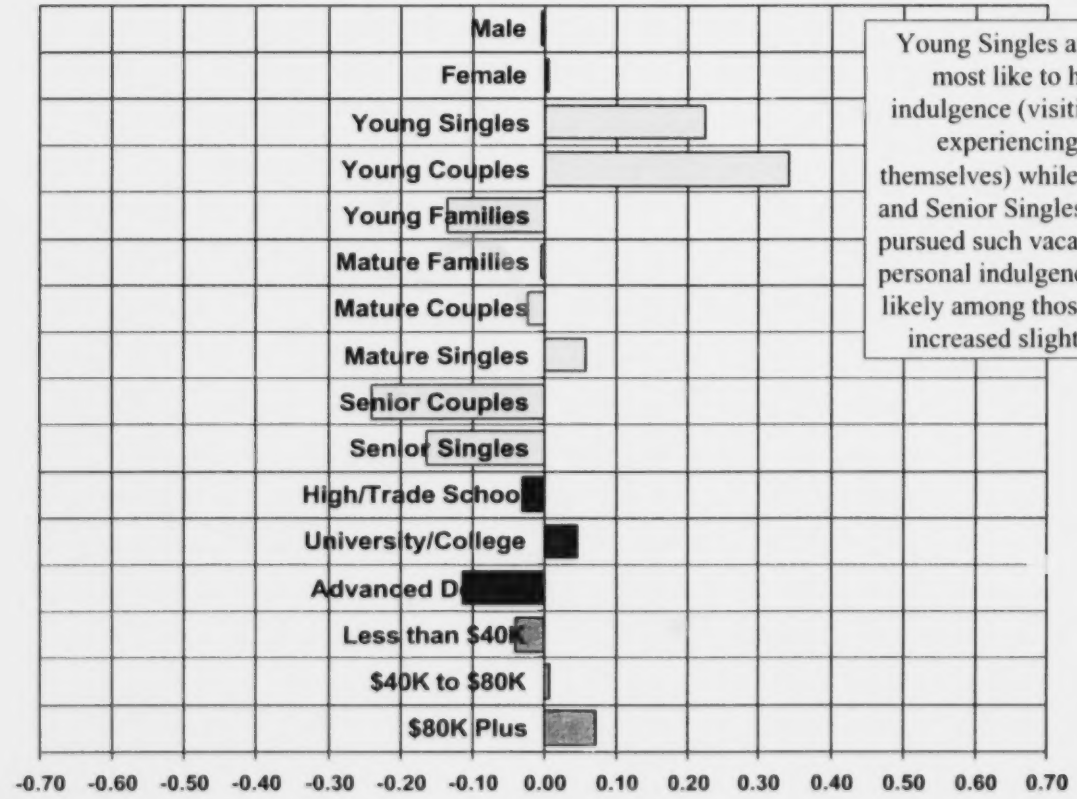


The five affluent segments were the most likely to have sought out opportunities for exploration during their vacations. This was especially evident among the Affluent Mature and Senior Couples. The Mainstream Youth Market, Young Mainstream Families and Senior Singles were the least likely to explore while on vacations.

General Vacation Experiences Sought in Past Two Years

Personal Indulgence

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

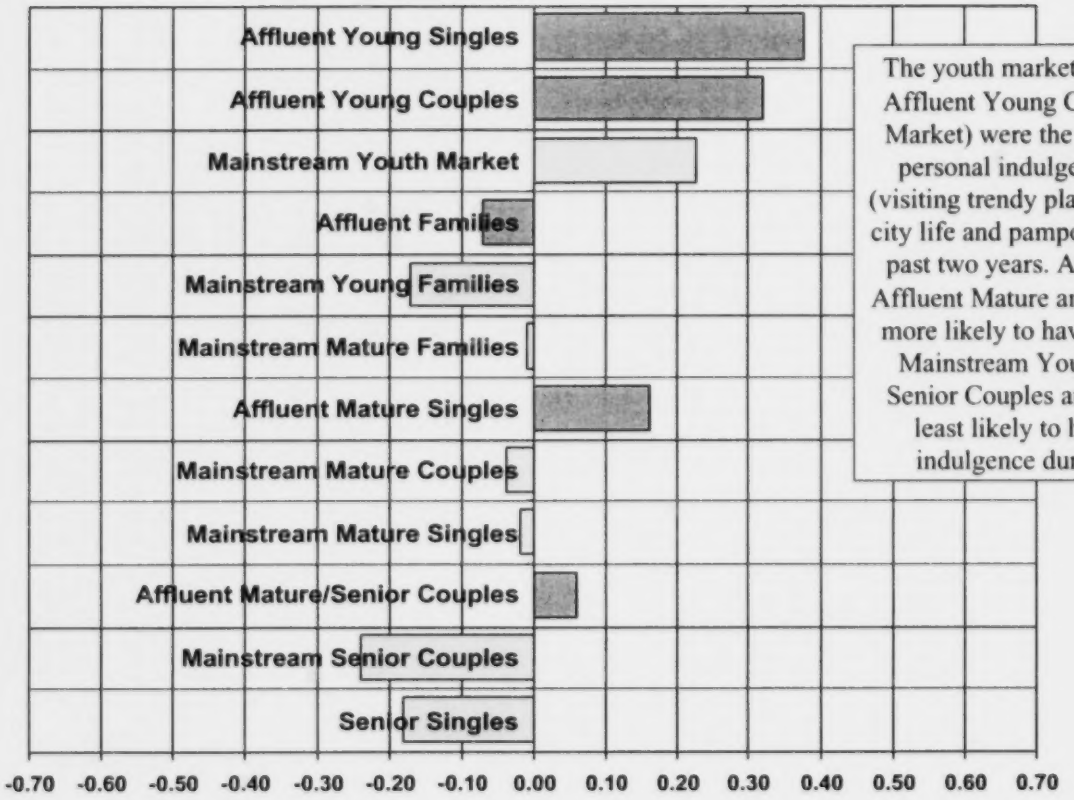


Young Singles and Young Couples were the most like to have engaged in personal indulgence (visiting trendy places, gambling, experiencing city life and pampering themselves) while on vacation. Senior Couples and Senior Singles were the least likely to have pursued such vacation activities. The pursuit of personal indulgence while on vacation was less likely among those with advanced degrees, but increased slightly with household income.

General Vacation Experiences Sought in Past Two Years

Personal Indulgence

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

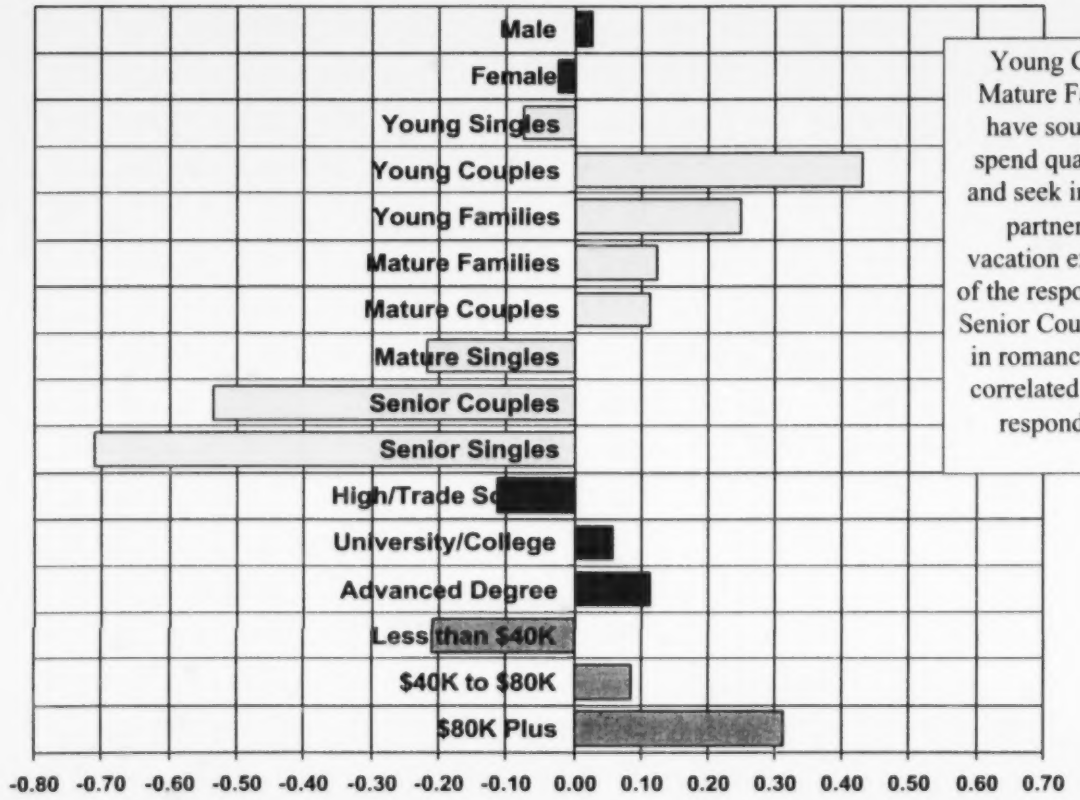


The youth markets (Affluent Young Singles, Affluent Young Couples, Mainstream Youth Market) were the most likely to have sought personal indulgence vacation experiences (visiting trendy places, gambling, experiencing city life and pampering themselves) during the past two years. Affluent Mature Singles and Affluent Mature and Senior Couples were also more likely to have sought such experiences. Mainstream Young Families, Mainstream Senior Couples and Senior Singles were the least likely to have sought out personal indulgence during their past vacations.

General Vacation Experiences Sought in Past Two Years

Romance & Relaxation

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

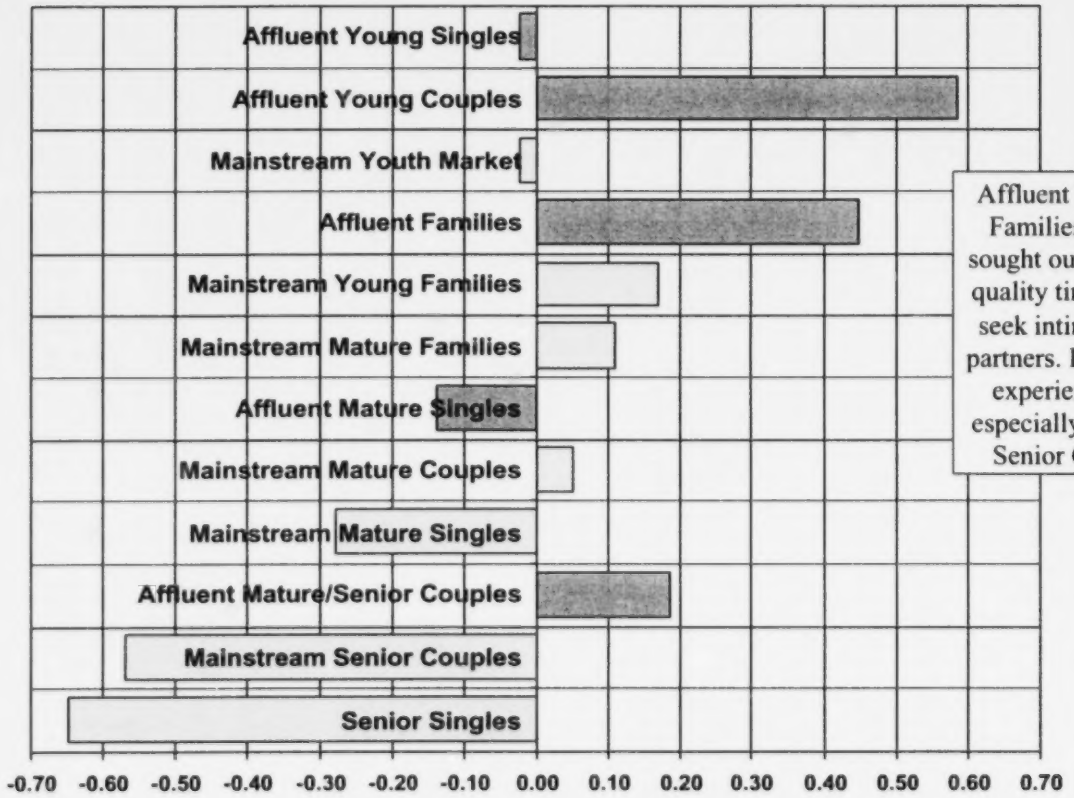


Young Couples, Young Families and Mature Families were the most likely to have sought out opportunities to relax, spend quality time with family members and seek intimacy and romance with their partners. The pursuit of this sort of vacation experience declines with the age of the respondent and was quite low among Senior Couples and Senior Singles. Interest in romance and relaxation was positively correlated with the education level of the respondent as well as the household income.

General Vacation Experiences Sought in Past Two Years

Romance & Relaxation

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

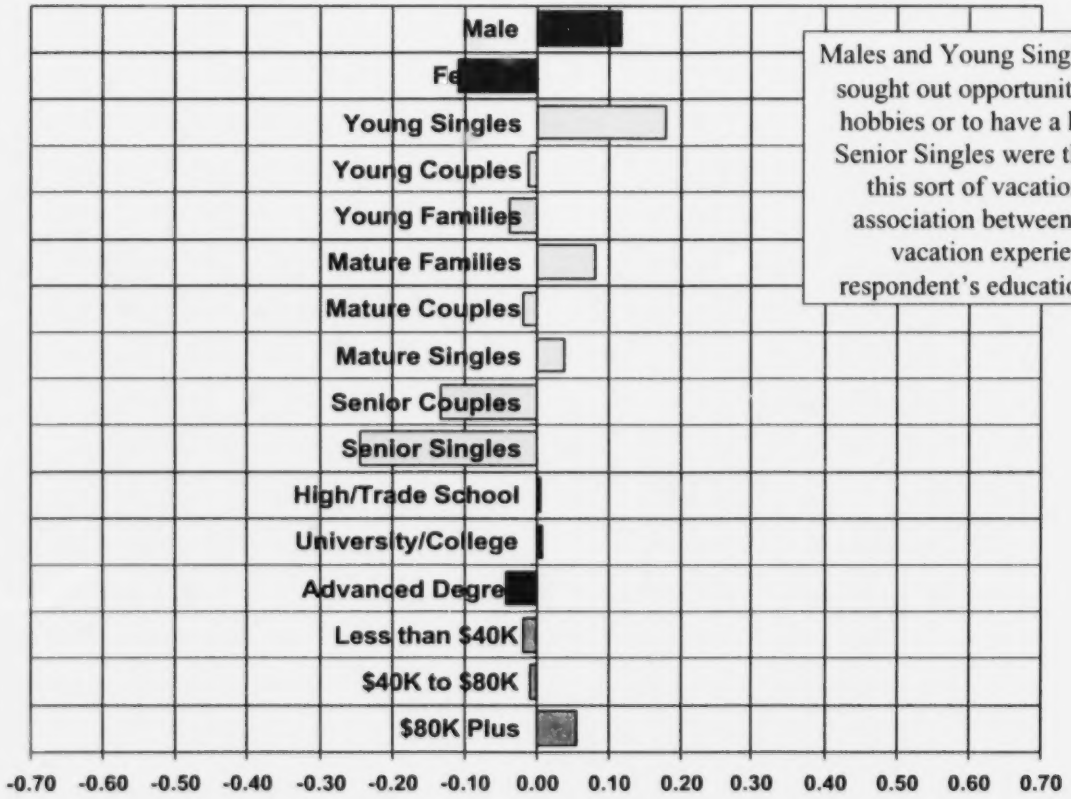


Affluent Young Couples and Affluent Families are the most likely to have sought out opportunities to relax, spend quality time with family members, and seek intimacy and romance with their partners. Interest in this sort of vacation experience declines with age and is especially unlikely among Mainstream Senior Couples and Senior Singles.

General Vacation Experiences Sought in Past Two Years

Sports, Hobbies & Learning

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

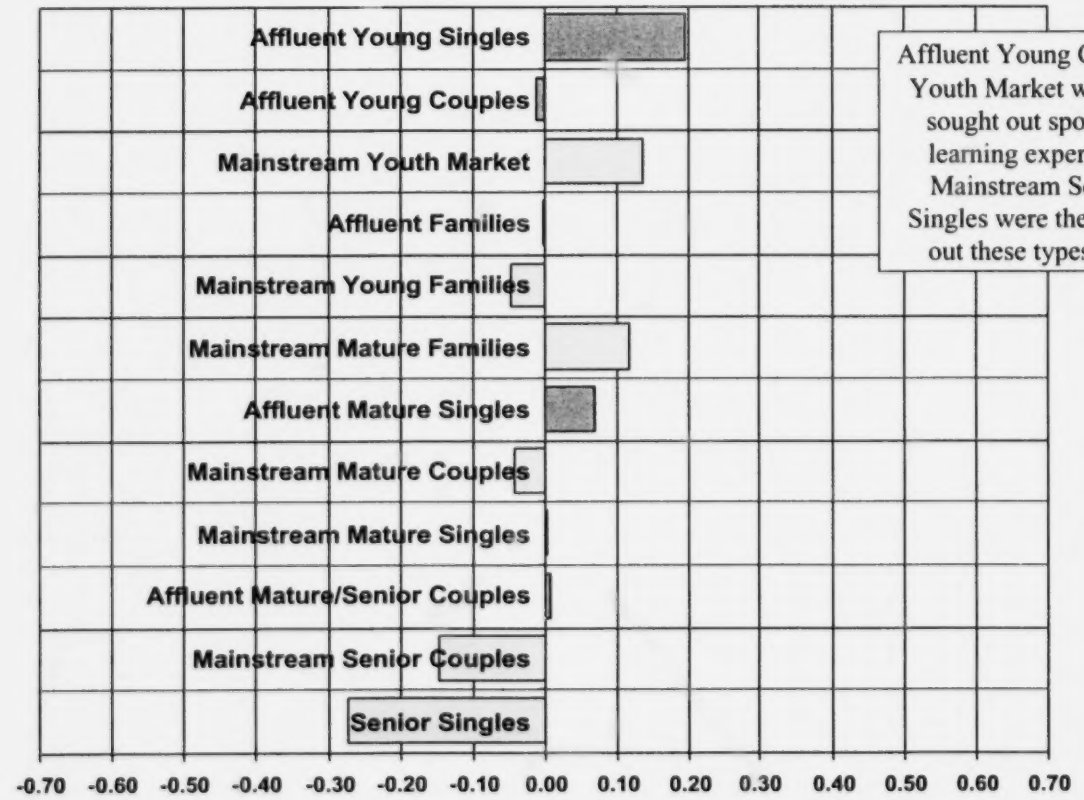


Males and Young Singles were the most likely to have sought out opportunities to participate in sports and hobbies or to have a hands-on learning experience. Senior Singles were the least likely to have pursued this sort of vacation experience. There was no association between the pursuit of these types of vacation experiences were sought and the respondent's education level or household income.

General Vacation Experiences Sought in Past Two Years

Sports, Hobbies & Learning

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

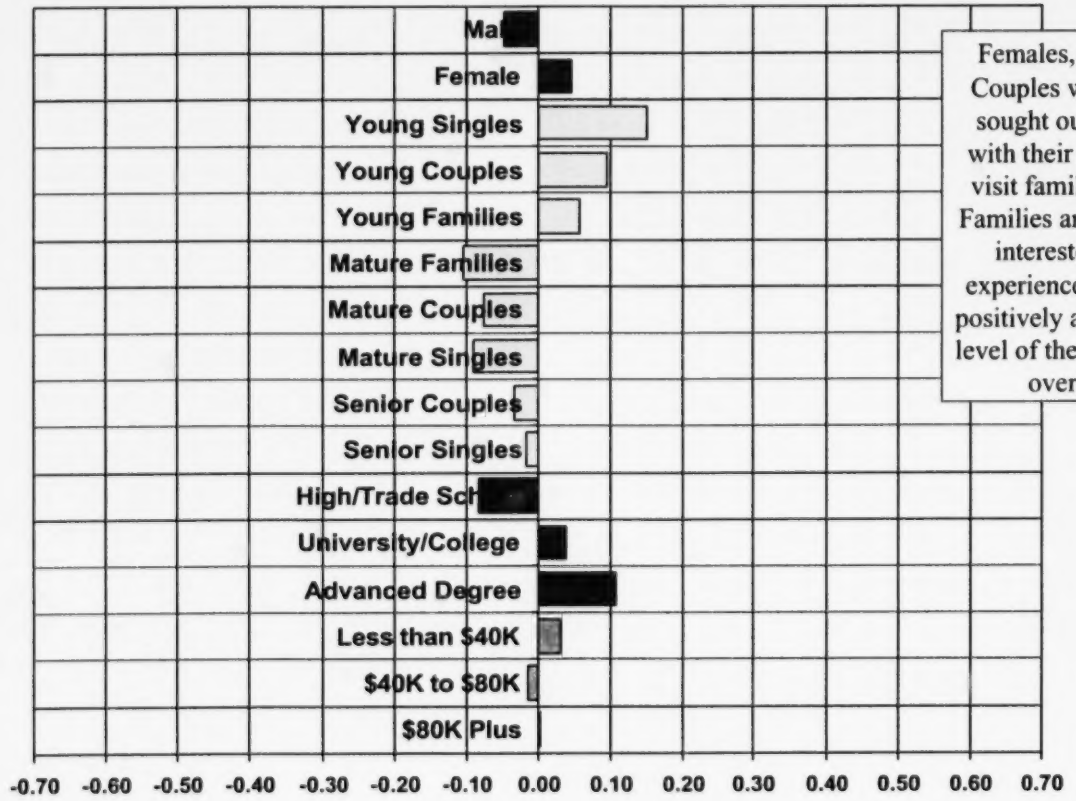


Affluent Young Couples and the Mainstream Youth Market were the most likely to have sought out sports, hobbies and hands-on learning experiences while on vacation. Mainstream Senior Couples and Senior Singles were the least likely to have sought out these types of vacation experiences.

General Vacation Experiences Sought in Past Two Years

Socialize

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

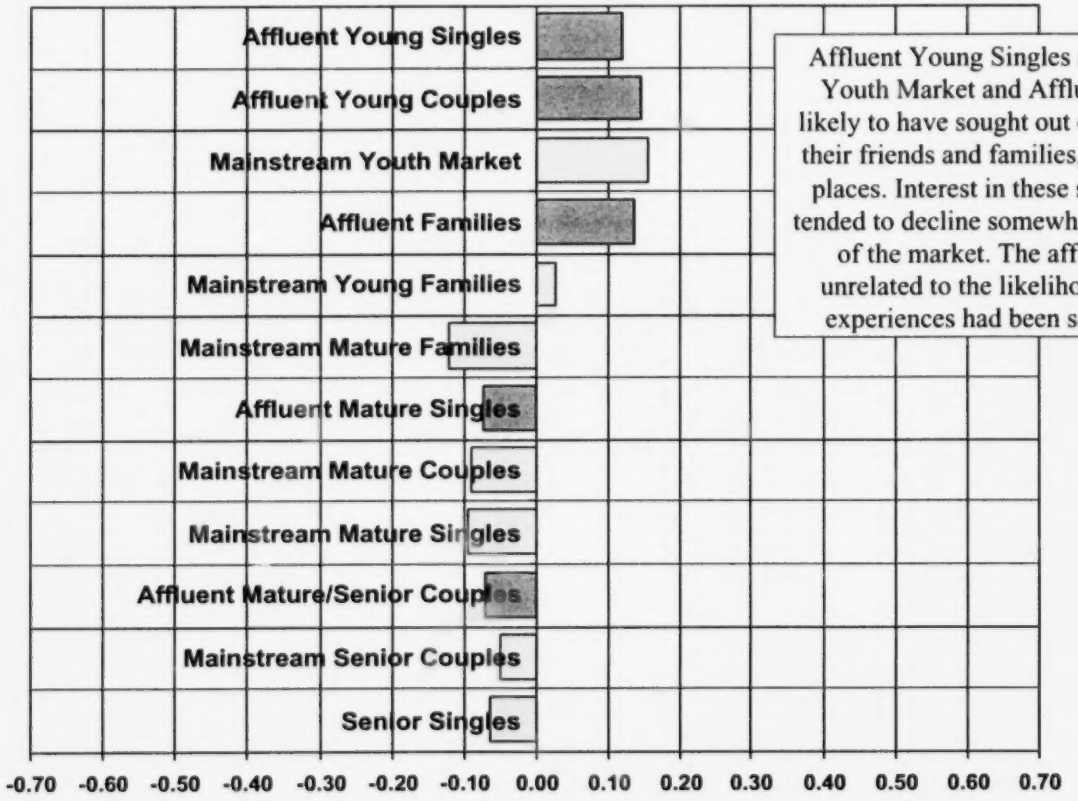


Females, Young Singles and Young Couples were the most likely to have sought out opportunities to socialize with their friends and families, and to visit familiar and safe places. Mature Families and Mature Couples were less interested in this sort of vacation experience. Interest in socializing was positively associated with the education level of the respondent, but not with the overall household income.

General Vacation Experiences Sought in Past Two Years

Socialize

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Affluent Young Singles and Couples, the Mainstream Youth Market and Affluent Families were the most likely to have sought out opportunities to socialize with their friends and families, and to visit familiar and safe places. Interest in these sorts of vacation experiences tended to decline somewhat among the mature segments of the market. The affluence of the segment was unrelated to the likelihood that socializing vacation experiences had been sought in the past two years.

Section Twelve

Outdoor Activities While Traveling

Outdoor Activities While Traveling

- Key Findings -

The most frequently undertaken outdoor activities while on a trip were those that were less strenuous and less expensive, such as going for picnics in park settings, sunbathing or sitting on a beach, swimming and viewing wildlife, wildflowers and flora. These outdoor activities may be enjoyed by individuals of all ages, regardless of their physical conditioning or financial circumstances.

Fishing and golfing were the most frequently undertaken sports activities, with 26 % of the travelers fishing in fresh water and 20 % playing an occasional game of golf while on a trip. Hiking and backpacking, working out in fitness centres or jogging, recreational biking, and canoeing and kayaking were also among the more common outdoor activities sought during a trip.

Outdoor activities which are more strenuous (e.g.,competitive sports such as baseball, volleyball, rock climbing, hang gliding, snowboarding) were generally confined to younger vacationers (34 and under), with participation rates declining sharply as a function of age. However, not all strenuous activities exhibit this age trend. For example, downhill skiing, sailing and motorcycling were often pursued by more mature travelers.

The types of outdoor vacation activities undertaken were largely associated with the age and lifecycle stage of the traveler. Thus, young vacationers were more like to pursue competitive, fitness-related and strenuous activities, families were more likely to seek outdoor activities which could be participated in with children (e.g., fishing, swimming) and mature travelers were more likely to participate in less strenuous outdoor pursuits. Seniors (those over 65) generally restrict their outdoor activities to more passive pursuits such as viewing natural sights. Activities that require special equipment (e.g., sailing, scuba diving) or are more expensive to pursue (golf, skiing) are more likely to be undertaken by the more affluent sectors of the market. This suggests that selecting prime markets for various outdoor activities may be largely determined by the gender, age and affluence of the individual.

Those who intended to take a trip during the next two years were asked which outdoor vacations they were likely to participate in. Compared to the past two years, future travelers are more likely to go swimming in an ocean, fresh water or salt water fish, hike, backpack, canoe or kayak, play the occasional game of golf and bike recreationally. They were also more likely to express an interest in more unusual activities such as whale watching or white water rafting or activities involving an element of risk (e.g., parachuting, bungee jumping, hot air ballooning, scuba diving, snowboarding). There is also increased interest in participating in sports activities more intensely, such as golfing at a resort or taking a packaged golf tour.

Outdoor Activities While Traveling

- Research Method -

In the mailback survey, those who had taken a trip during the past two years were asked which of 59 outdoor activities they had participated in over the course of the last two years of travel (Note: see pages 316 to 318 for a list of these activities).

They were also asked which of these same outdoor activities they were likely to pursue over the course of the next two years.

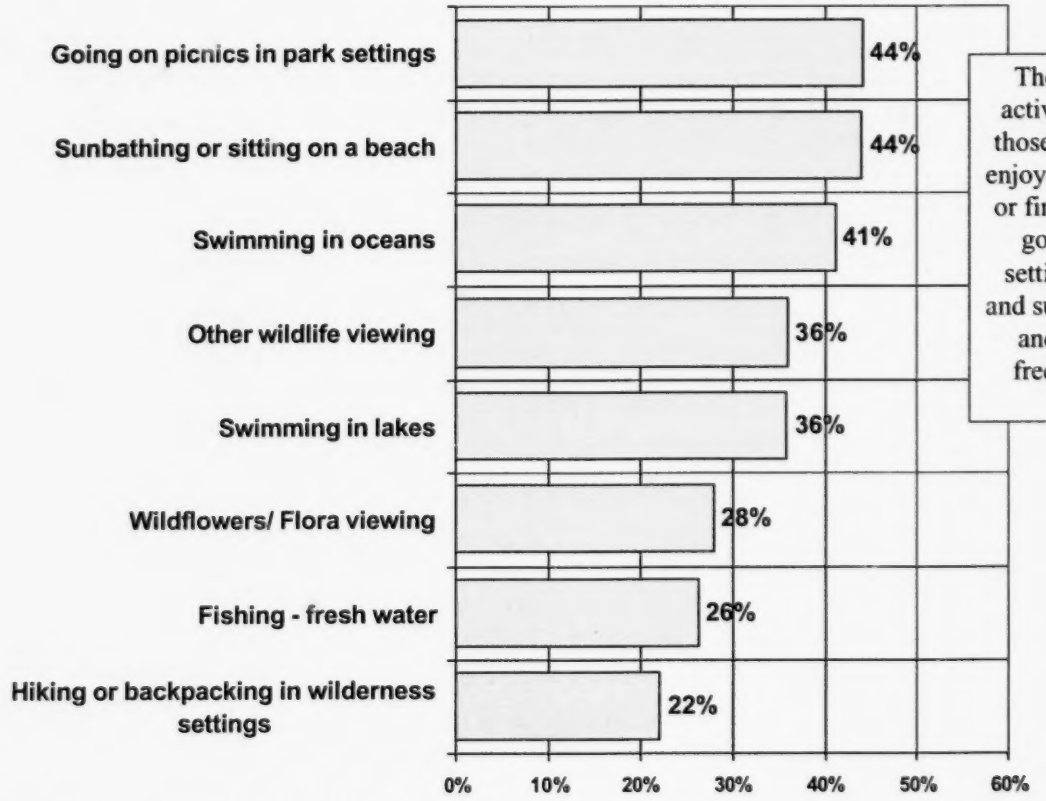
The outdoor vacation activities sought during the last two years were factor analysed to identify general patterns in the types of outdoor activities sought during travel.

The likelihood that various types of outdoor activities had been pursued during the past two years was examined by country and market segment.

The Most Common Outdoor Activities Sought

During Travel in the Past two years

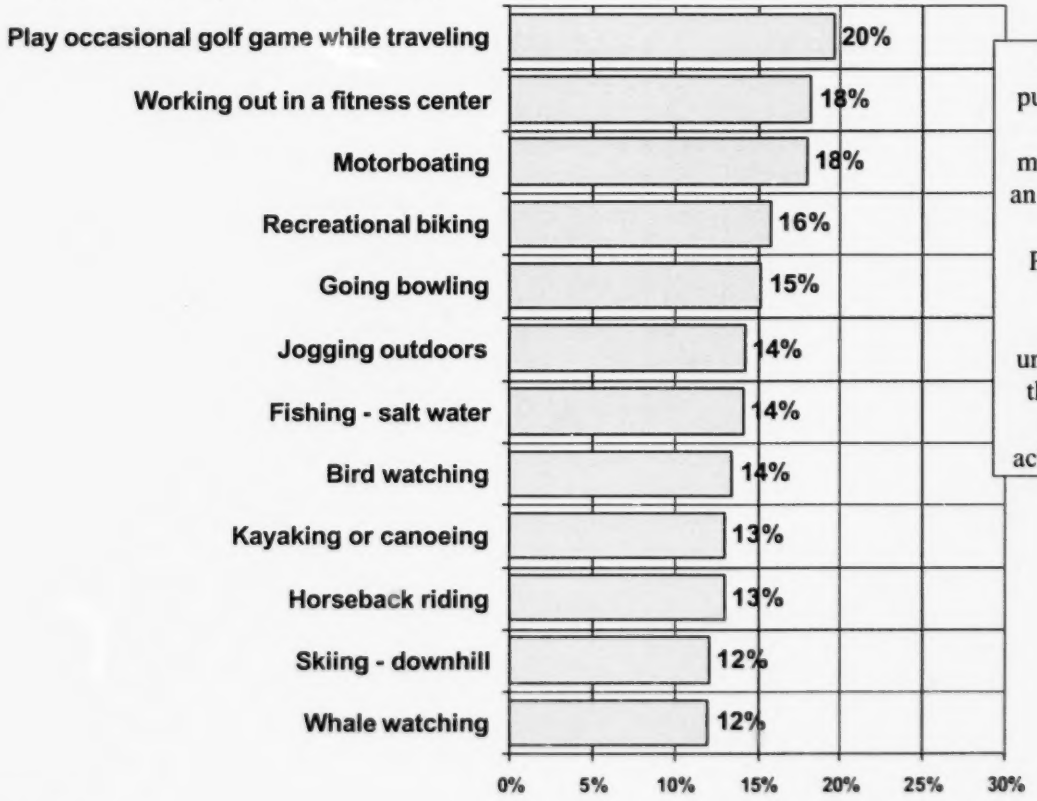
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



The most commonly pursued outdoor activities while traveling were generally those which are less strenuous and can be enjoyed by travelers regardless of their age or financial circumstances. These include going on picnics and outings in park settings, swimming (in oceans or lakes) and sunbathing, viewing wildlife and flora, and hiking or backpacking. The most frequently pursued sports activity was fishing (in fresh water).

Outdoor Activities Sought By 10 % to 20 %
of the Travelers During the Past two years

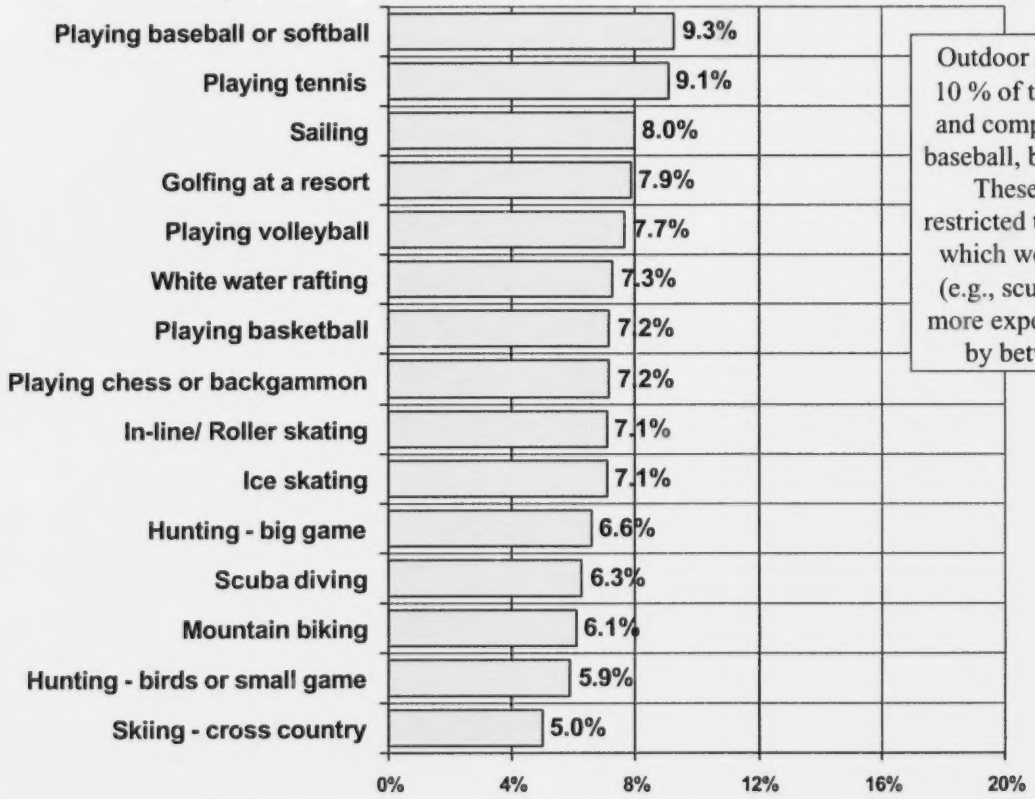
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relatively common outdoor vacation pursuits (participated in by between 10 % and 20 % of travelers) were often moderately strenuous and include playing an occasional game of golf, working out in a fitness centre or jogging outdoors. Popular activities such as bowling, salt-water fishing, downhill skiing and canoeing and kayaking were also undertaken by between 10 % and 20 % of the travelers. It is of interest to note that 12 % report "whale watching" as an activity pursued during the past two years.

Outdoor Activities Sought By 5 % to 10 % of the Travelers During the Past two years

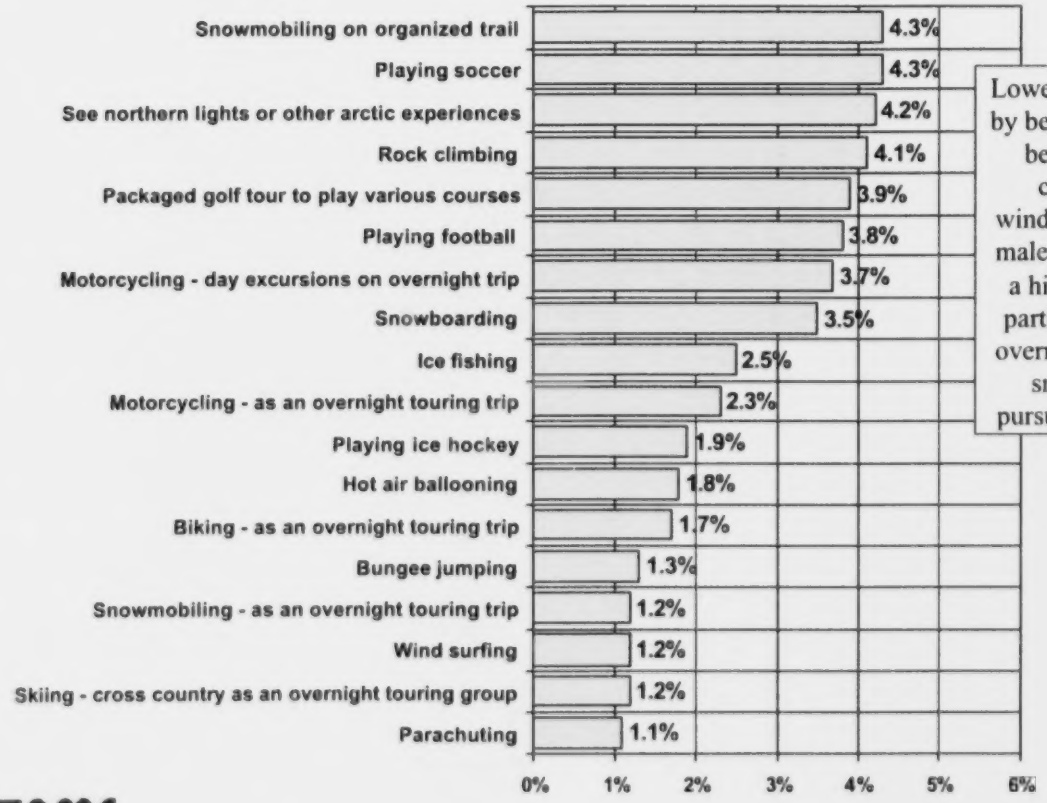
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Outdoor activities pursued by between 5 % and 10 % of the travelers were often more strenuous and competitive pursuits such as playing tennis, baseball, basketball, volleyball, or in-line skating. These sorts of activities were more often restricted to younger vacationers. Those activities which were likely to require special equipment (e.g., scuba diving, sailing, golf) and tend to be more expensive, were also frequently undertaken by between 5 % and 10 % of the travelers.

Outdoor Activities Sought By 1 % to 5 % of the Travelers During the Past two years

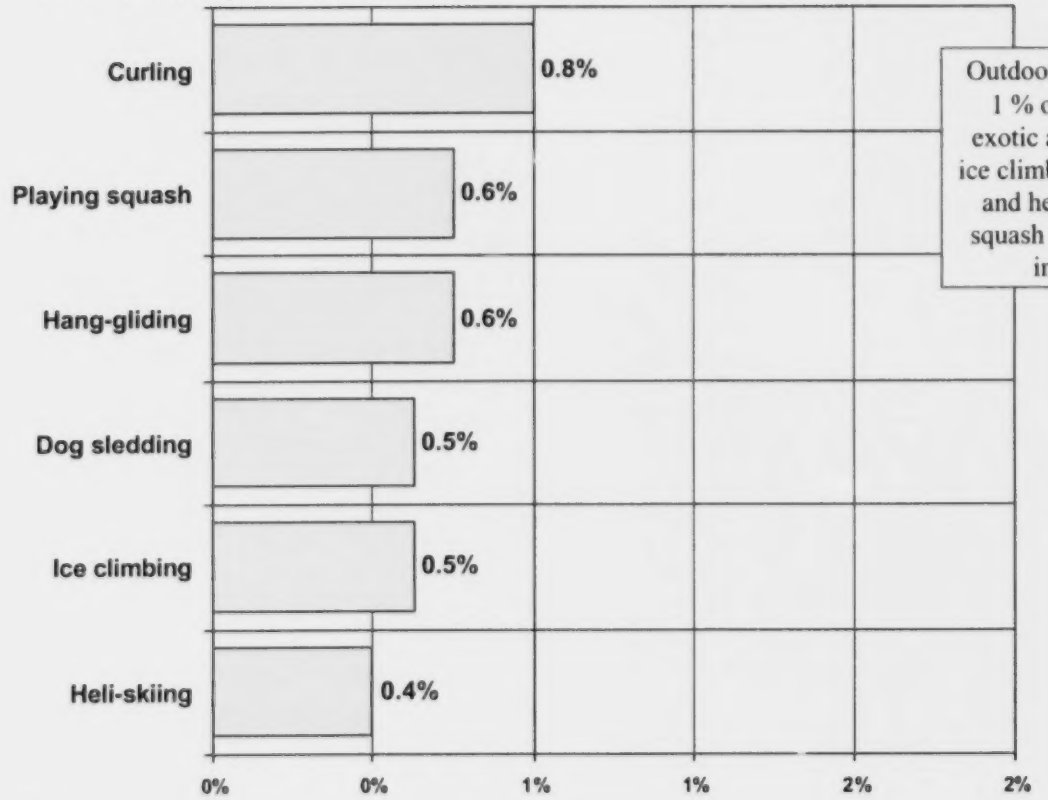
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Lower incidence outdoor activities (participated in by between 1 % and 5 % of travelers) often tend to be quite strenuous (e.g., playing soccer, rock climbing, snowboarding, playing football, windsurfing) and were largely limited to younger, male vacationers. Outdoor activities which reflect a high level of involvement or enthusiasm for a particular type of activity (e.g., motorcycling on overnight tour, biking on overnight tour, skiing or snowmobiling on overnight tour) were also pursued by between 1 % and 5 % of the travelers.

Outdoor Activities Sought By Less Than 1 %
of the Travelers During the Past two years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

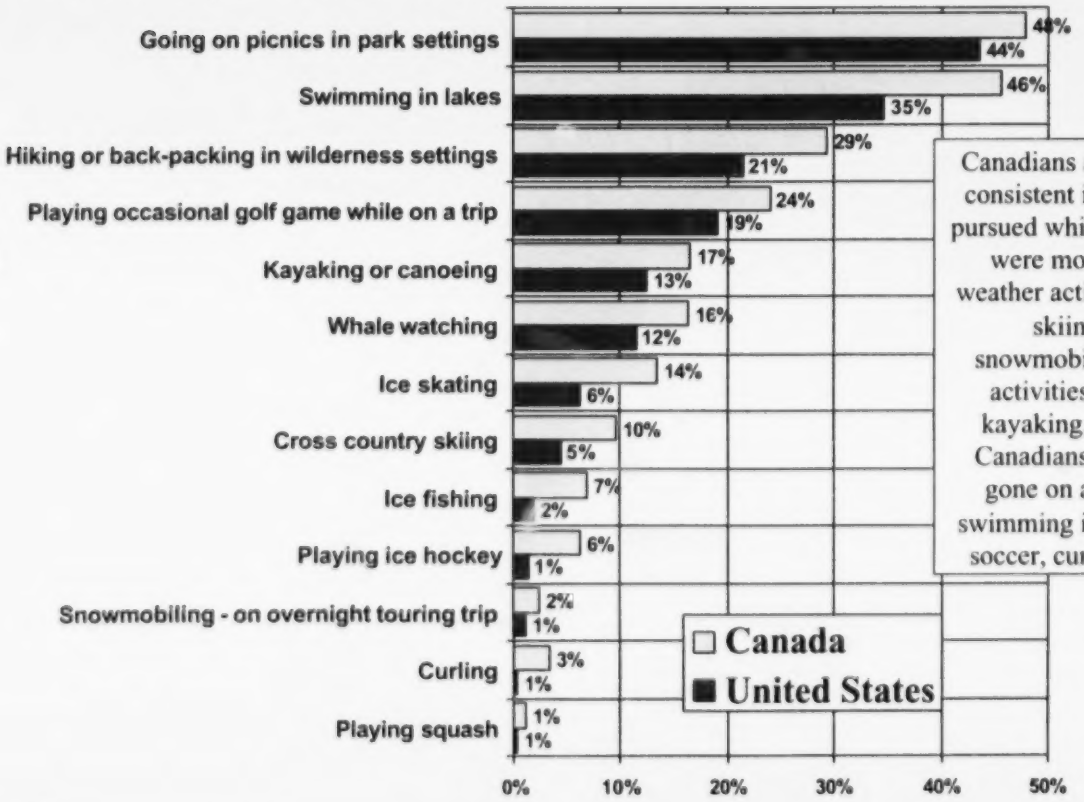


Outdoor activities pursued by less than 1 % of the adult travelers are often exotic and strenuous activities such as ice climbing, dog sledding, hang-gliding and heli-skiing. Curling and playing squash were also rarely undertaken by individuals while on a trip.

Outdoor Activities More Often Sought By Canadians

During Travel in the Past two years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada vs. U.S. (Mailback Survey)



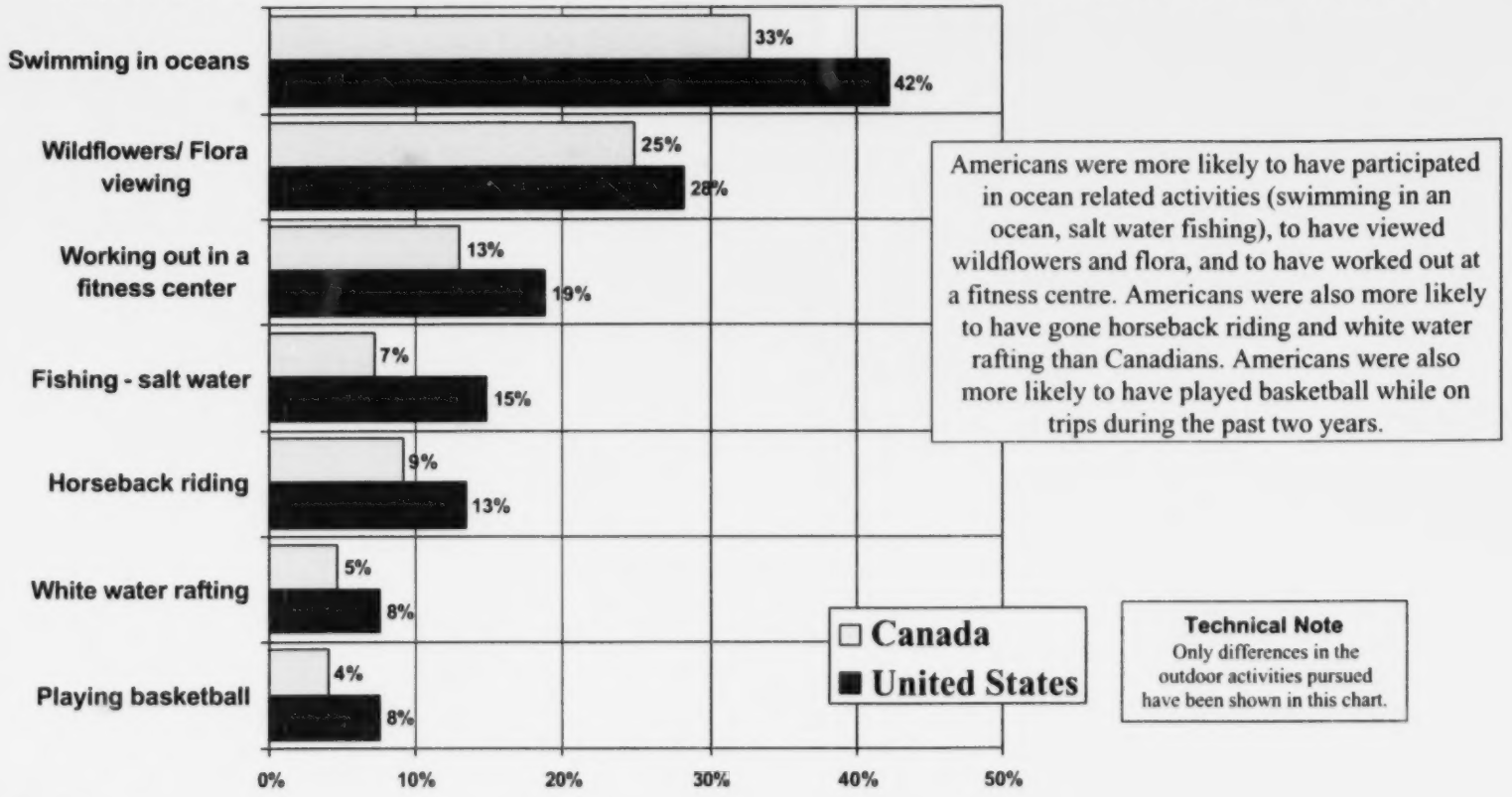
Canadians and Americans were remarkably consistent in the types of outdoor activities pursued while traveling. However, Canadians were more likely to participate in cold weather activities (ice skating, cross-country skiing, ice fishing, ice hockey, snowmobiling) as well as nature oriented activities such as hiking, backpacking, kayaking, canoeing or whale watching). Canadians were also more likely, to have gone on a picnic in a park setting, gone swimming in lakes, and to have played golf, soccer, curling and squash while on a trip.

Technical Note
Only differences in the outdoor activities pursued have been shown in this chart.

Outdoor Activities More Often Sought By Americans

During Travel in the Past two years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



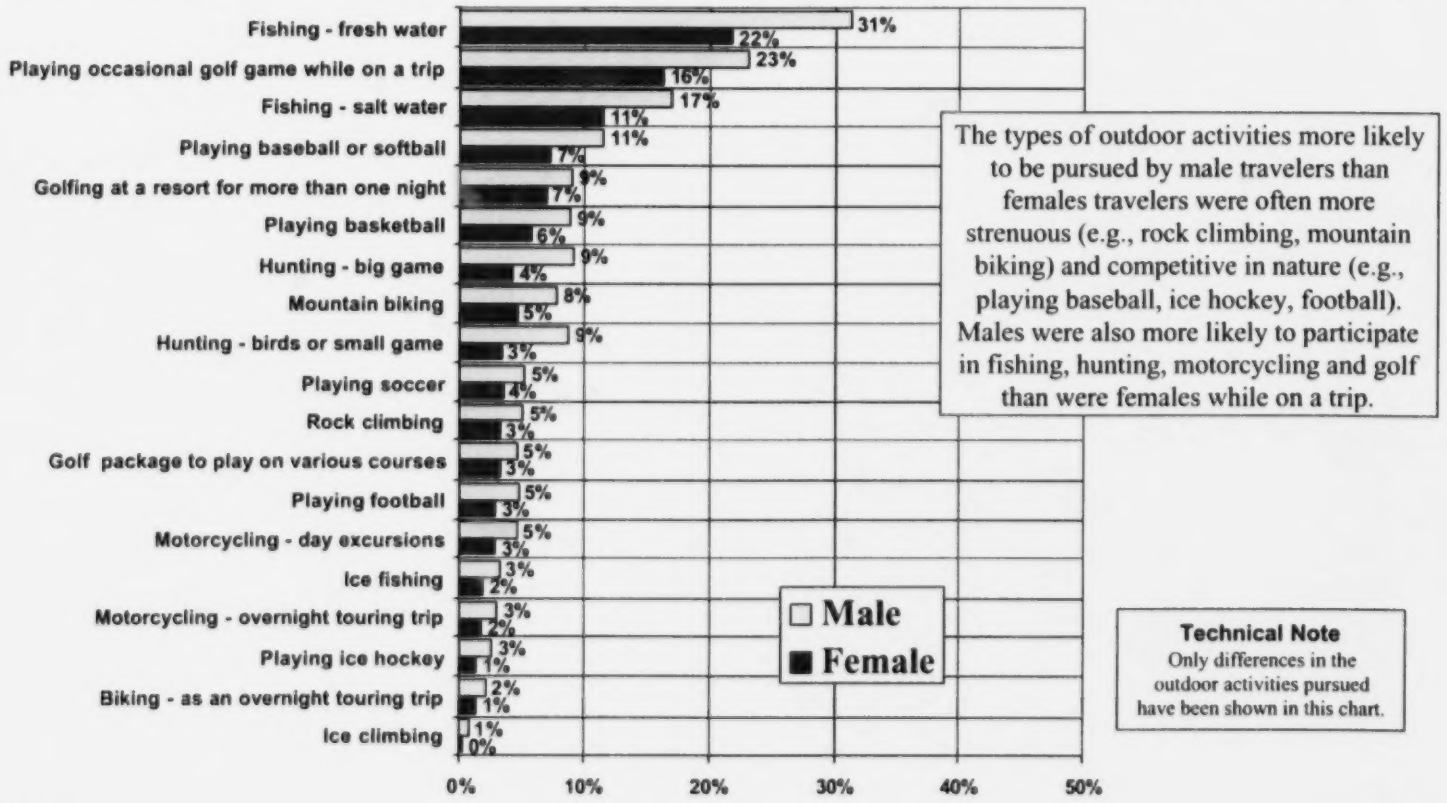
Americans were more likely to have participated in ocean related activities (swimming in an ocean, salt water fishing), to have viewed wildflowers and flora, and to have worked out at a fitness centre. Americans were also more likely to have gone horseback riding and white water rafting than Canadians. Americans were also more likely to have played basketball while on trips during the past two years.

Technical Note
Only differences in the outdoor activities pursued have been shown in this chart.

Outdoor Activities More Often Sought By Males

During Travel in the Past two years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



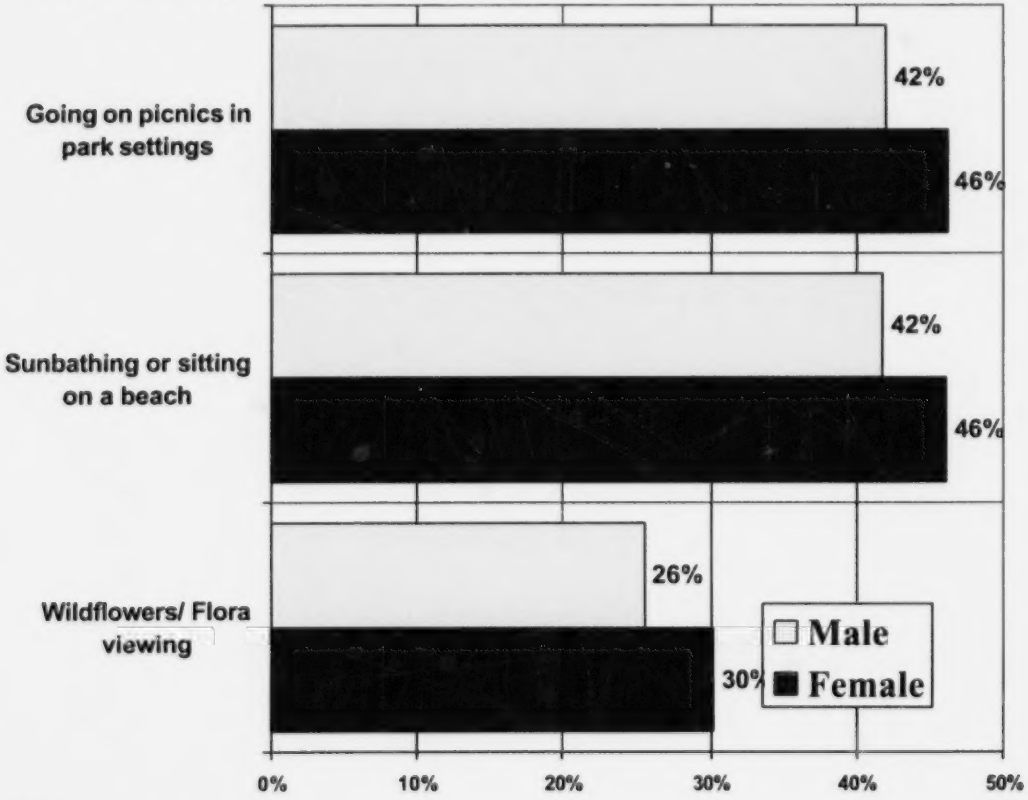
The types of outdoor activities more likely to be pursued by male travelers than females travelers were often more strenuous (e.g., rock climbing, mountain biking) and competitive in nature (e.g., playing baseball, ice hockey, football). Males were also more likely to participate in fishing, hunting, motorcycling and golf than were females while on a trip.

Technical Note
Only differences in the outdoor activities pursued have been shown in this chart.

Outdoor Activities More Often Sought By Females

During Travel in the Past two years

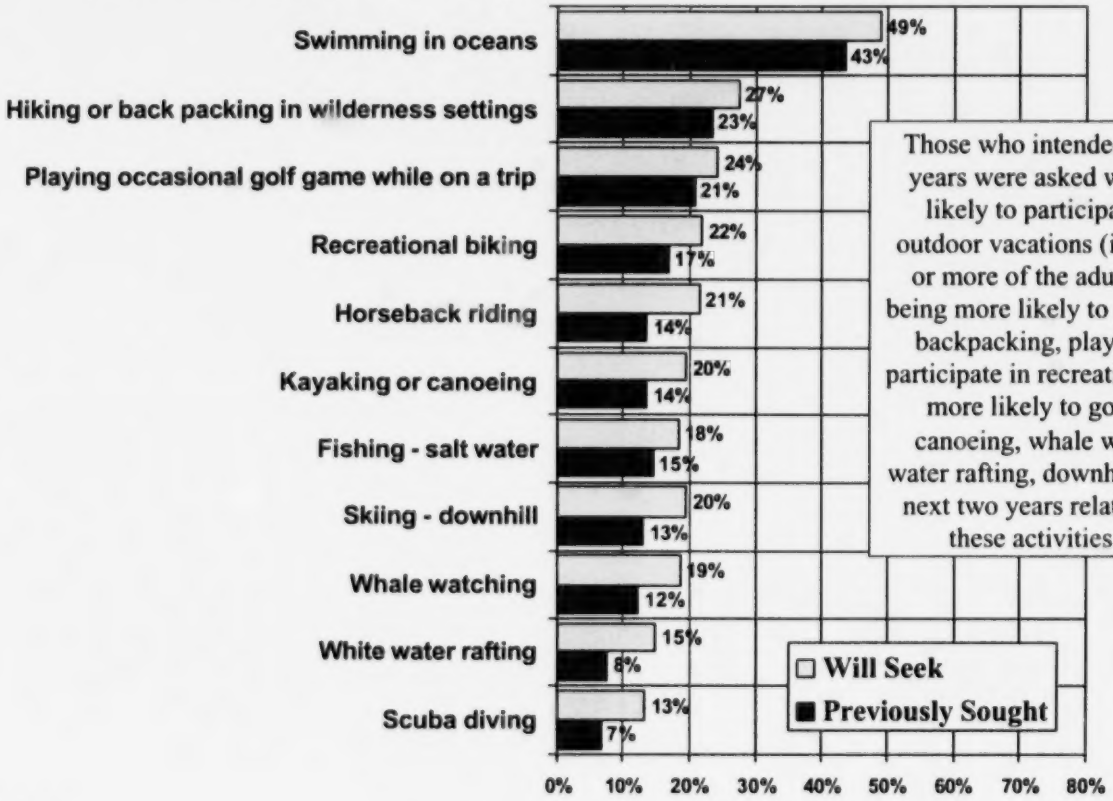
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Females were less active in outdoor activities while traveling than males. Those outdoor activities more likely to be pursued by females than males were less strenuous (e.g., going for picnics in park settings, sunbathing or sitting on a beach, wildlife viewing).

Common Outdoor Activities More Likely to Be Sought During Travel in the Next two years Relative to Last two years

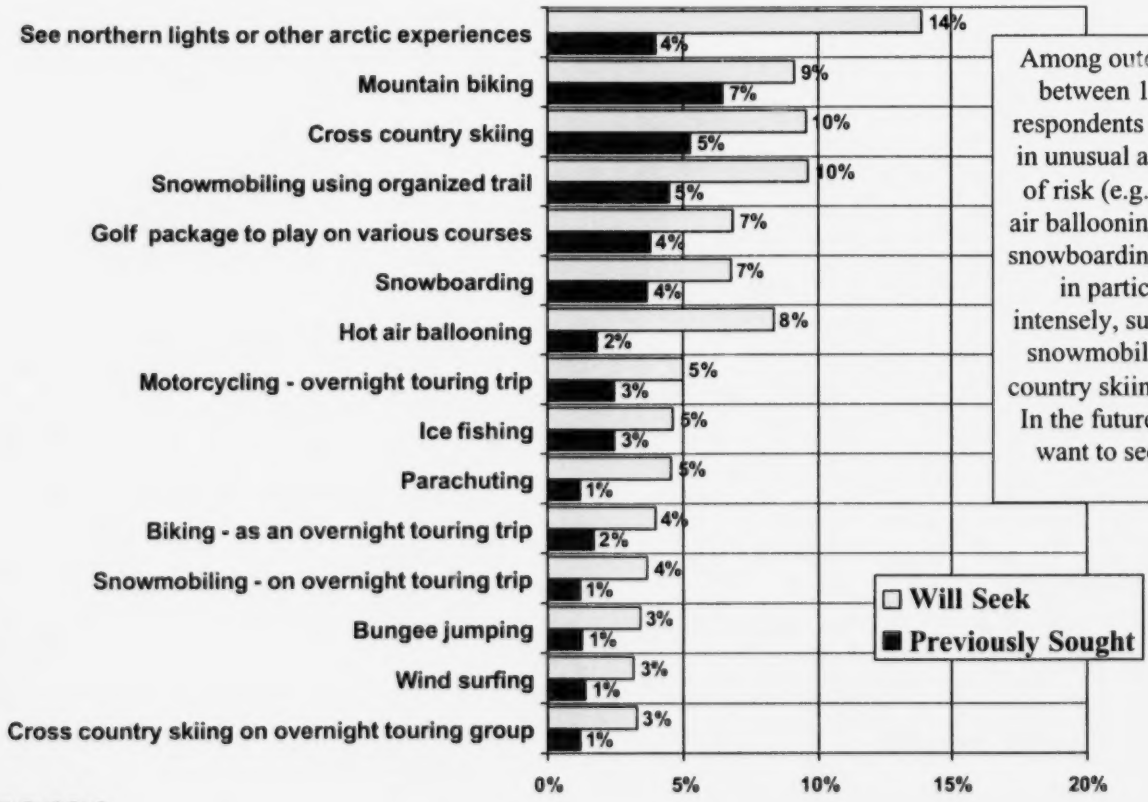
Base: Those (18 Plus) Having Taken Trips & Planning to Take A Trip: Canada & U.S.A.



Those who intended to take a trip during the next two years were asked which outdoor vacations they were likely to participate in. Among the more common outdoor vacations (i.e., those activities pursued by 5 % or more of the adult travelers), respondents reported being more likely to go swimming in an ocean, hiking or backpacking, play the occasional game of golf, and participate in recreational biking. Respondents were also more likely to go horseback riding, kayaking and canoeing, whale watching, salt water fishing, white water rafting, downhill skiing or scuba diving during the next two years relative to the past two years. Many of these activities tend to be exotic and unusual.

Moderately Common Outdoor Activities More Likely to Be Sought During Travel in the Next two years Relative to Last two years

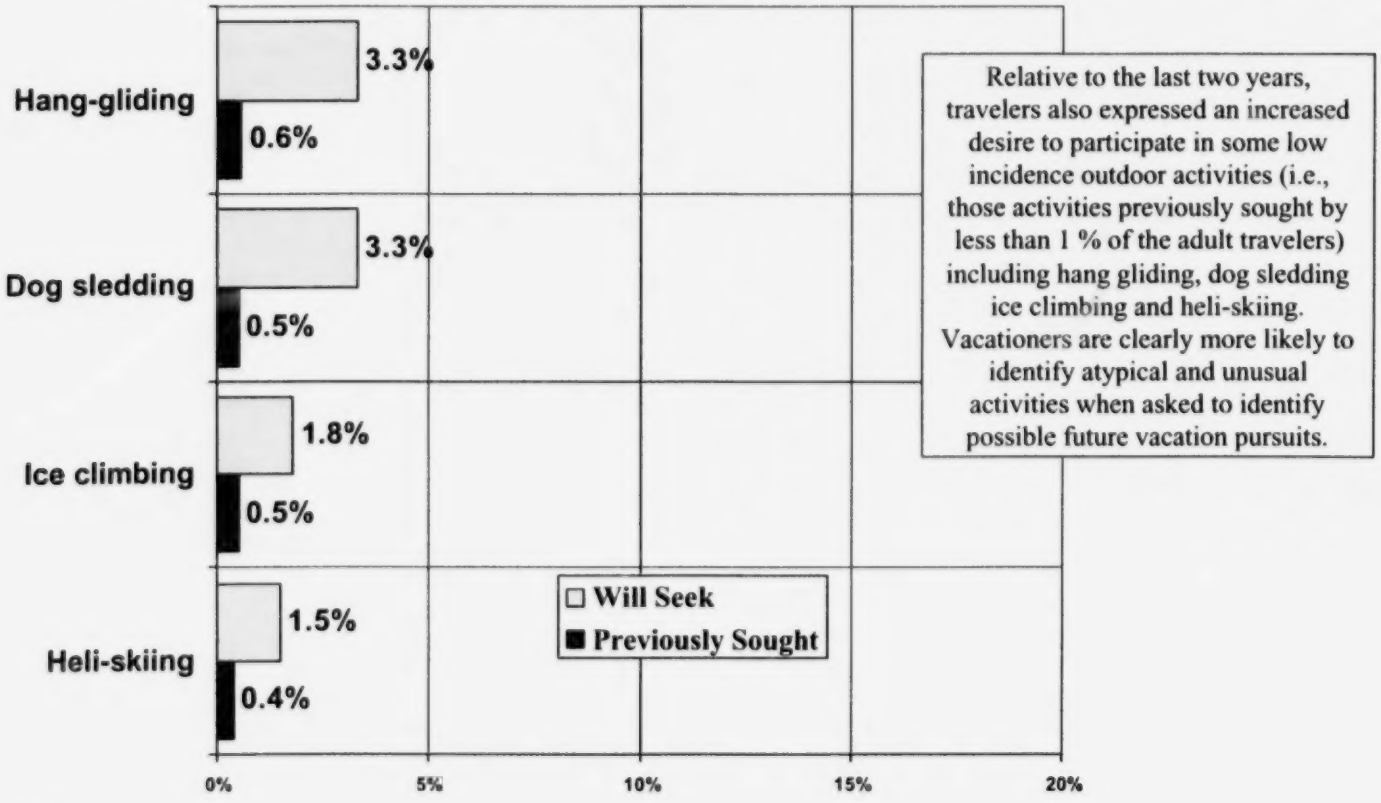
Base: Those (18 Plus) Having Taken Trips & Planning to Take A Trip: Canada & U.S.A.



Among outdoor activities previously sought by between 1 % and 5 % of the adult travelers, respondents were more likely to express interest in unusual activities often involving an element of risk (e.g., parachuting, bungee jumping, hot air ballooning, white water rafting, scuba diving, snowboarding). There was also increased interest in participating in sports activities more intensely, such as taking a packaged golf tour or snowmobiling, biking, motorcycling or cross-country skiing as part of an overnight tour group. In the future, travelers were also more likely to want to see the northern lights or have other Arctic experiences.

Low Incidence Outdoor Activities More Likely to Be Sought During Travel in the Next two years Relative to Last two years

Base: Those (18 Plus) Having Taken Trips & Planning to Take A Trip: Canada & U.S.A.



Relative to the last two years, travelers also expressed an increased desire to participate in some low incidence outdoor activities (i.e., those activities previously sought by less than 1 % of the adult travelers) including hang gliding, dog sledding ice climbing and heli-skiing. Vacationers are clearly more likely to identify atypical and unusual activities when asked to identify possible future vacation pursuits.

Factor Analysis of Outdoor Activities While Traveling

The outdoor vacation activities sought in the last two years were submitted to a factor analysis to identify general outdoor activities sought in travel. Factor analysis is a statistical technique which uses the association between individual responses to construct more general (or abstract) categories of outdoor activities sought by individuals while traveling. The factors may be used to generate factor scores, which measure the degree to which these general categories of outdoor activities have been pursued by various types of travelers. This analysis identified the following 17 types of outdoor activities:

Competitive Sports

- Playing basketball; Baseball; Football; Volleyball; Bowling; Soccer ; Chess or Backgammon; Tennis

Nature Sports

- White water rafting; Kayaking and canoeing; Hiking or backpacking; Horseback riding

Water Sports

- Sailing; Windsurfing; Scuba diving

Extreme Sports

- Hang-gliding; Hot air ballooning; Parachuting; Bungee jumping

Factor Analysis of Outdoor Activities While Traveling (Continued)

Golfing

- Golfing at a resort; Taking a packaged golf tour; Playing occasional golf game

Biking

- Recreational biking; Mountain biking; Biking on overnight tour trip

Motorcycling

- Motorcycling on overnight touring trip; Motorcycling - Day excursion

Fishing

- Salt water fishing; Fresh water fishing; Motor-boating

Hunting

- Hunting big game; Hunting small game

Fitness

- Jogging outdoors; Working out in fitness centre

Skiing

- Cross-country skiing; Cross-country skiing as an overnight tour group; Downhill skiing

Factor Analysis of Outdoor Activities While Traveling (Continued)

Snowmobiling

- Snowmobiling as an overnight tour trip; Snowmobiling on organized trails

Skating and Hockey

- Ice skating; Playing ice hockey; In-line/Roller skating

Extreme Winter Sports

- Rock climbing; Ice climbing; Heli-skiing; Snowboarding

Swimming & Sunbathing

- Sunbathing or sitting on a beach; Swimming in oceans; Swimming in lakes; Going on picnics in park settings

Natural SightSeeing

- Wildflower & flora viewing; Other wildlife viewing; Bird watching

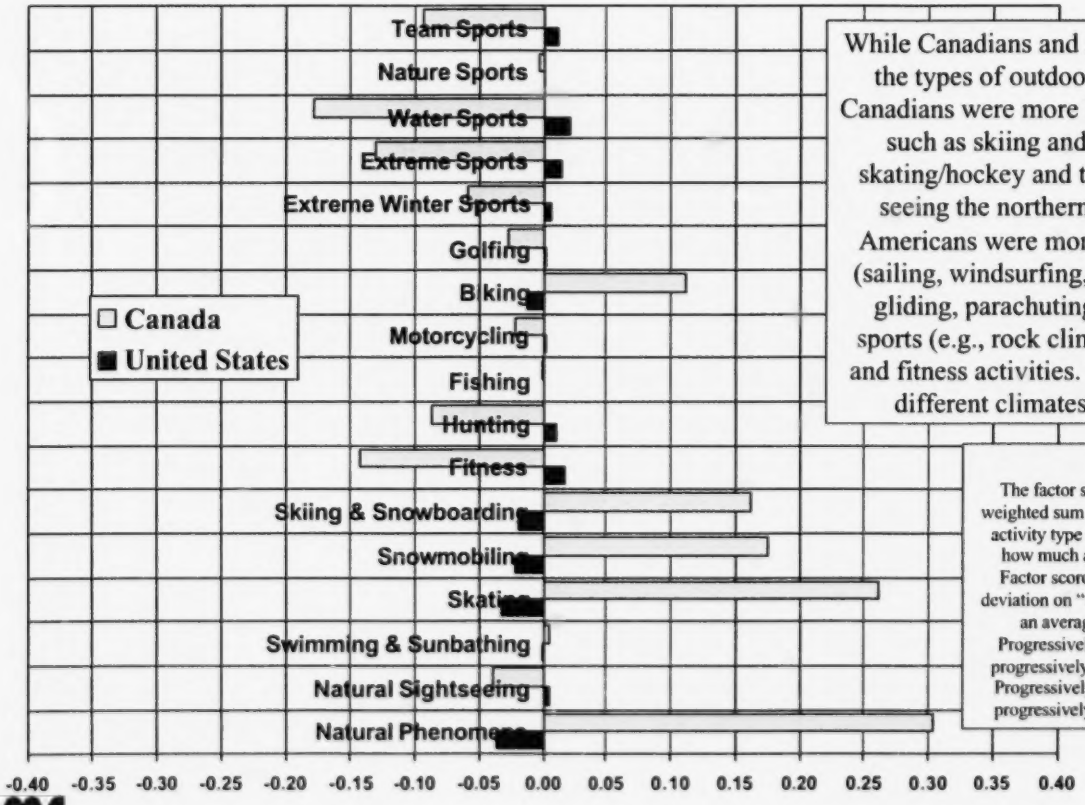
Natural Phenomena

- Seeing the northern lights or other arctic experiences; Whale watching

Outdoor Activities Sought While Traveling in Past Two Years

Canada versus United States

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While Canadians and Americans were remarkably similar in the types of outdoor vacations pursued while traveling, Canadians were more likely to participate in winter activities such as skiing and snowboarding, snowmobiling and skating/hockey and to have seen natural phenomena (e.g., seeing the northern lights or other arctic experiences). Americans were more likely to participate in water sports (sailing, windsurfing, scuba diving), extreme sports (hang-gliding, parachuting, bungee jumping), extreme winter sports (e.g., rock climbing, ice climbing), fishing, hunting and fitness activities. These differences partially reflect the different climates of Canada and the United States.

Technical Note

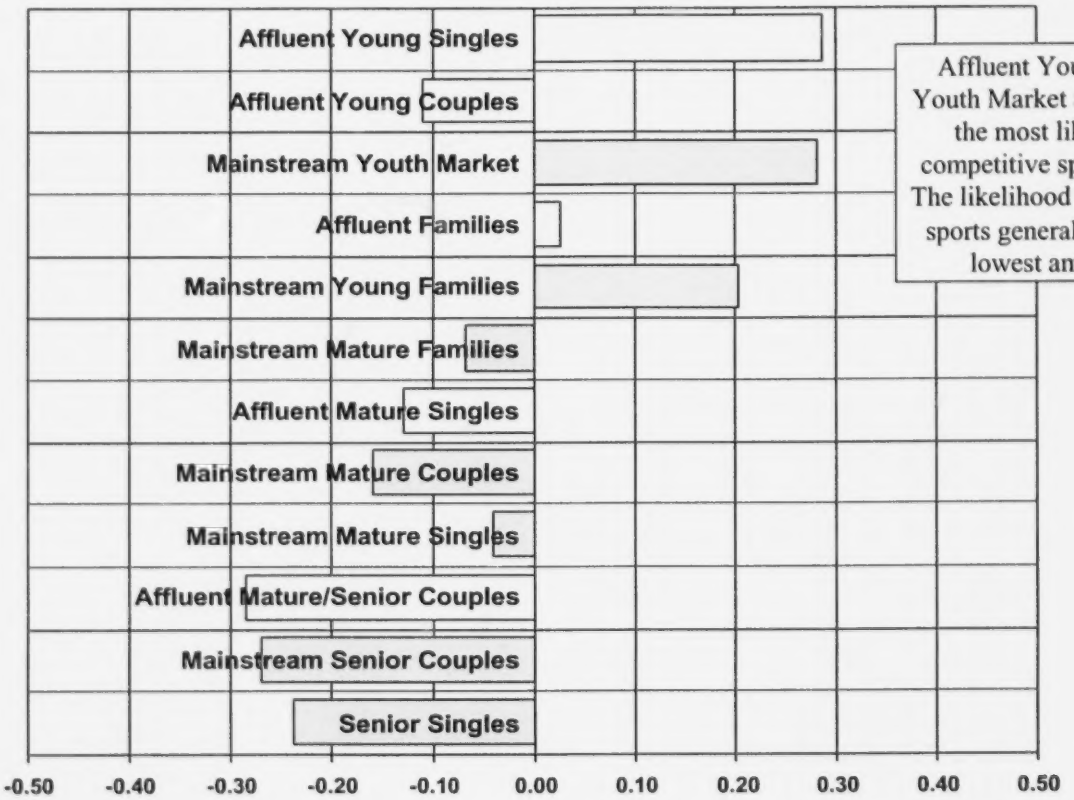
The factor scores for each outdoor activity type is determined by the weighted sum of all activities with those more closely associated with the activity type receiving a larger weight. The weighting is determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation on "1". A value of "0" means that the type of traveler exhibited an average tendency to pursue a given type of outdoor activity. Progressively more positive values indicate that the traveler type was progressively more likely to have pursued this type of outdoor activity. Progressively more negative values indicate that the traveler type was progressively less likely to have pursued this type of outdoor activity.

Outdoor Activities Sought While Traveling in Past Two Years

Competitive Sports

Basketball, Baseball, Football, Volleyball, Bowling, Soccer, Chess, Backgammon, Tennis

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



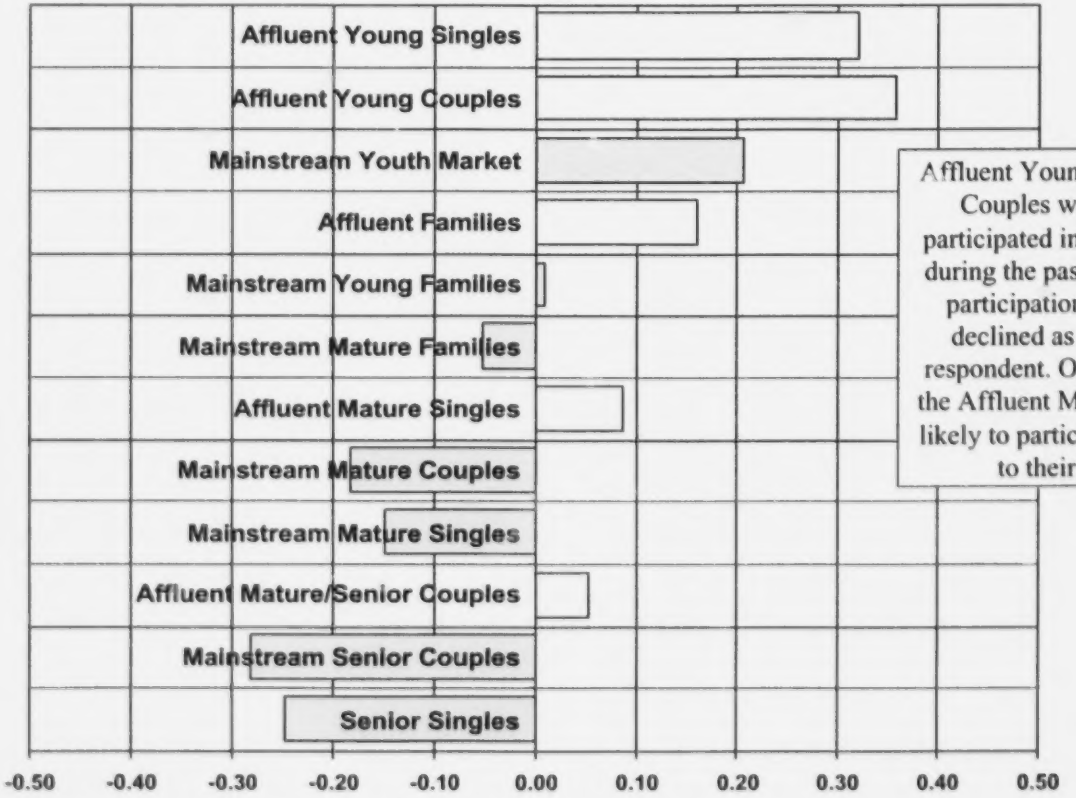
Affluent Young Singles, the Mainstream Youth Market and Mainstream Families were the most likely to have participated in competitive sports activities while on a trip. The likelihood of participation in competitive sports generally declined with age and was lowest among the senior segments.

Outdoor Activities Sought While Traveling in Past Two Years

Nature Sports

White Water Rafting, Kayaking & Canoeing, Hiking & Backpacking; Horseback Riding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



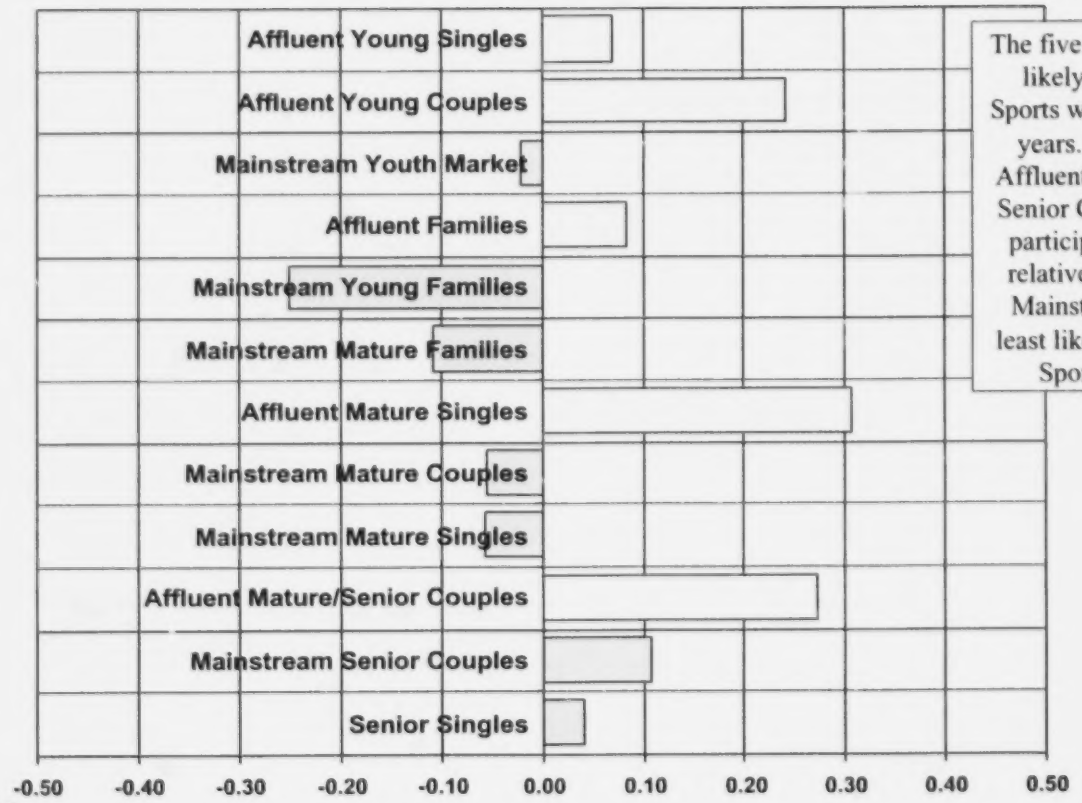
Affluent Young Singles and Affluent Young Couples were the most likely to have participated in Nature Sports while on a trip during the past two years. The likelihood of participation in Nature Sports generally declined as a function of the age of the respondent. One exception to this trend was the Affluent Mature Singles, who were more likely to participate in Nature Sports relative to their same-age peer groups.

Outdoor Activities Sought While Traveling in Past Two Years

Water Sports

Sailing, Wind Surfing & Scuba Diving

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



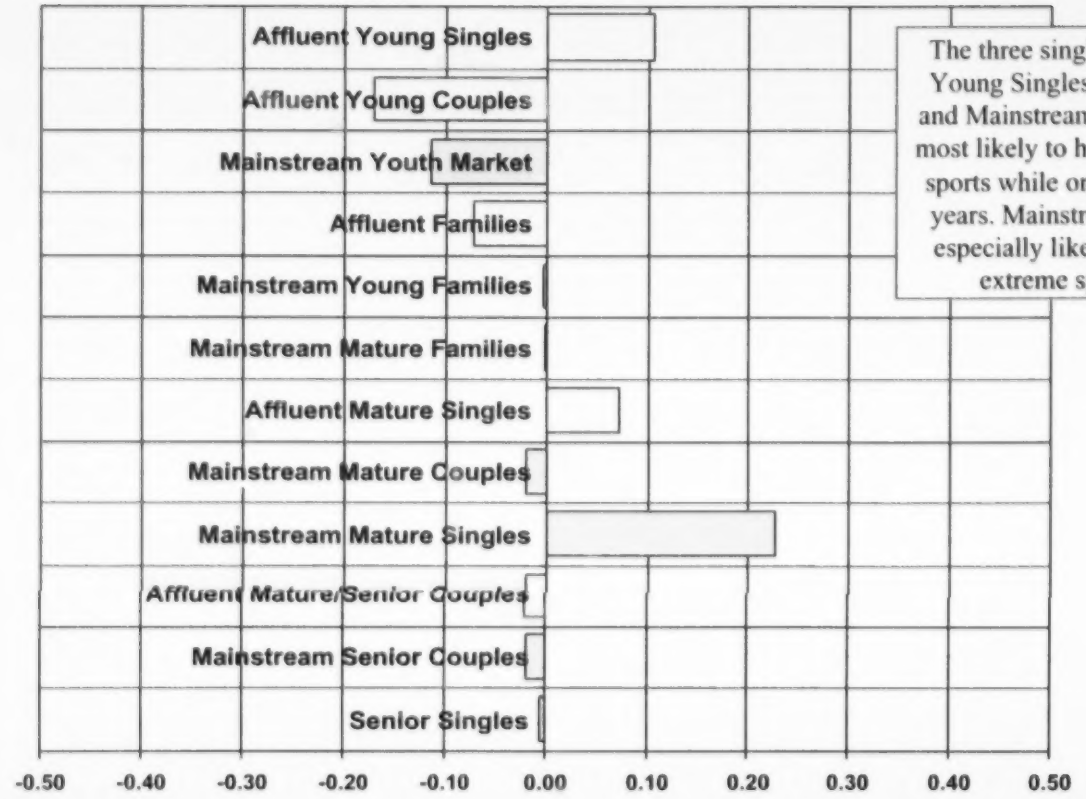
The five affluent segments were the most likely to have participated in Water Sports while on a trip during the past two years. The Affluent Young Couples, Affluent Mature Singles and Mature and Senior Couples were also more likely to participate in Water Sports, especially relative to their same-age peer groups. Mainstream Young Families were the least likely to have participated in Water Sports during the past two years.

Outdoor Activities Sought While Traveling in Past Two Years

Extreme Sports

Hang-gliding, Hot Air Ballooning, Parachuting, Bungee Jumping

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



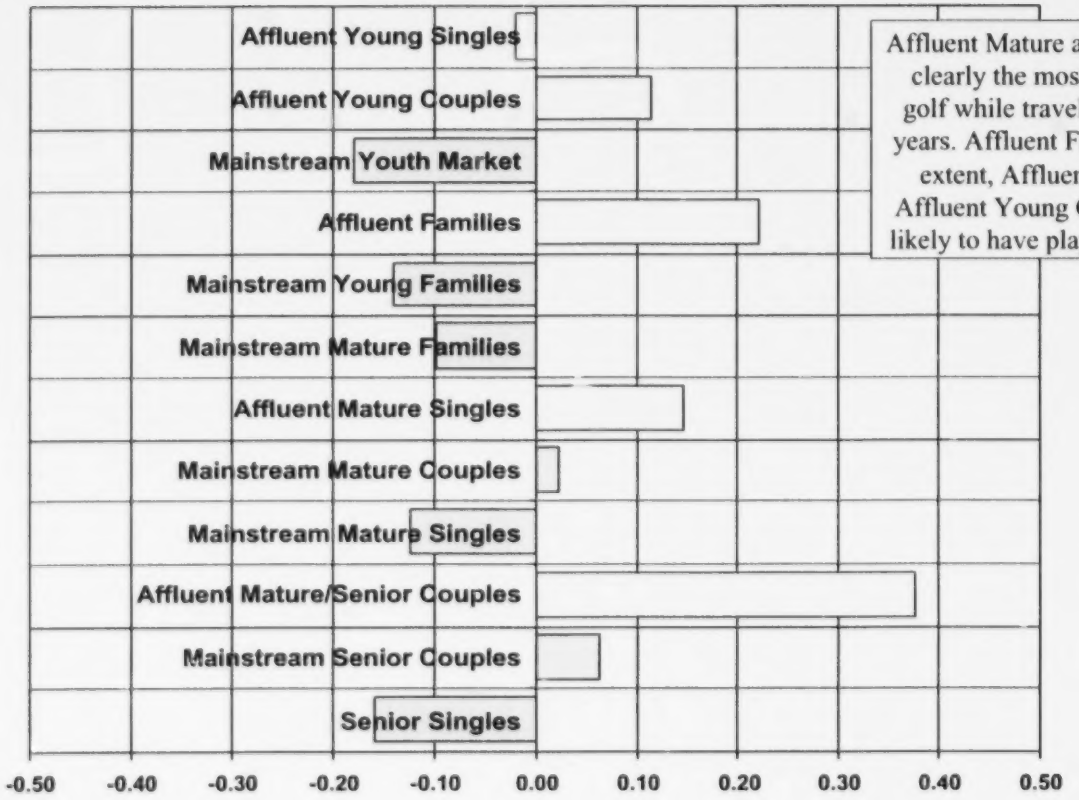
The three single segments (i.e., Affluent Young Singles, Affluent Mature Singles and Mainstream Mature Singles) were the most likely to have participated in extreme sports while on a trip during the past two years. Mainstream Mature Singles were especially likely to have participated in extreme sports while traveling.

Outdoor Activities Sought While Traveling in Past Two Years

Golfing

Golfing at a resort, Taking a golfing package tour, Playing the occasional game of golf

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



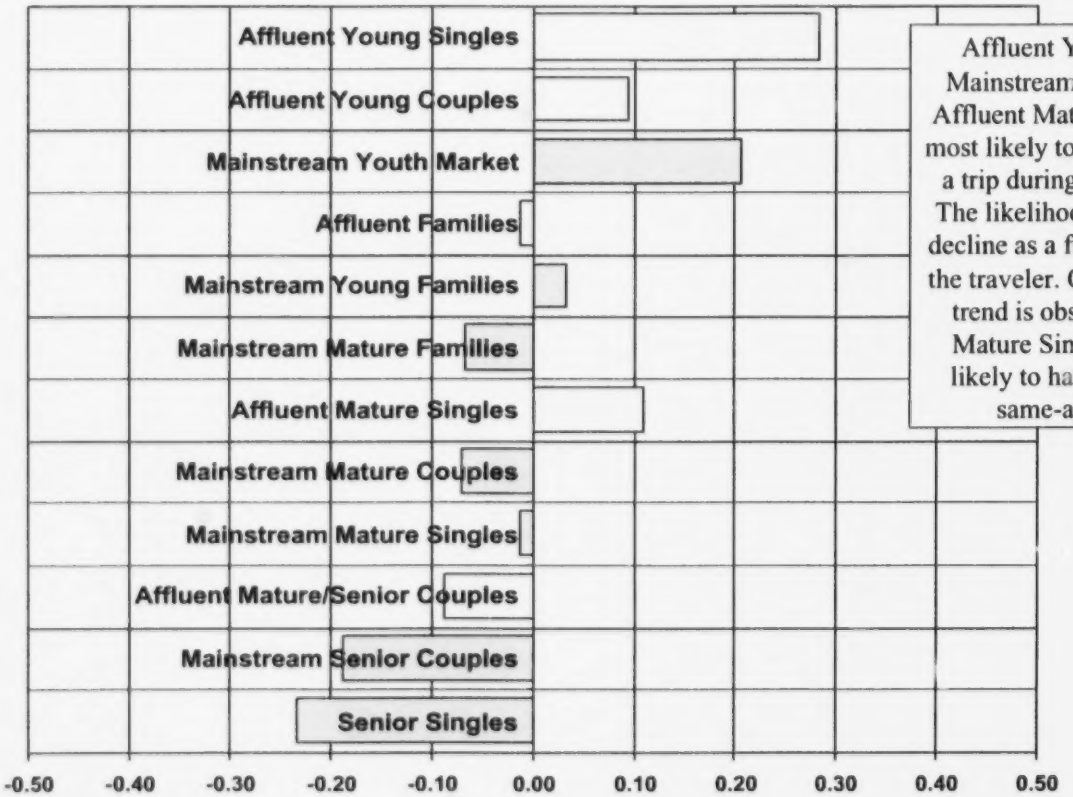
Affluent Mature and Senior Couples were clearly the most likely to have played golf while traveling during the last two years. Affluent Families, and to a certain extent, Affluent Mature Singles and Affluent Young Couples were also more likely to have played golf while on a trip.

Outdoor Activities Sought While Traveling in Past Two Years

Biking

Recreational Biking, Mountain Biking, Biking on Overnight Tour Trip

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



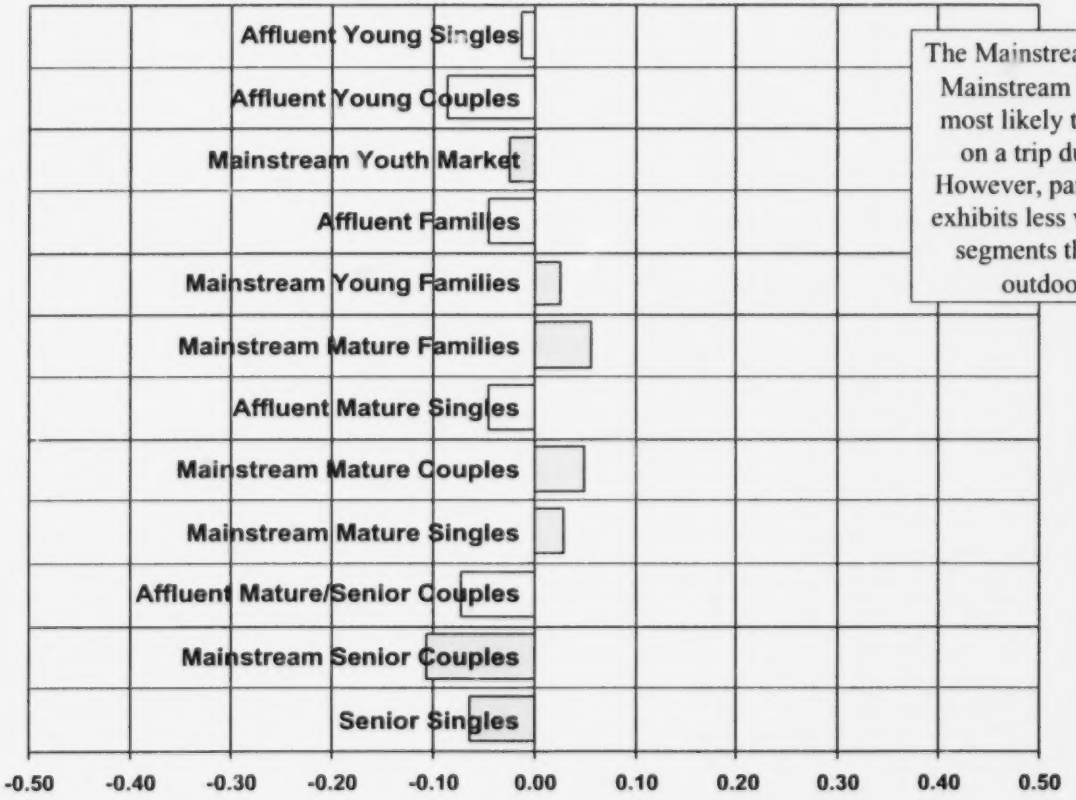
Affluent Young Singles, the Mainstream Youth Market and Affluent Mature Singles were the most likely to have biked while on a trip during the past two years. The likelihood of biking tends to decline as a function of the age of the traveler. One exception to this trend is observed for Affluent Mature Singles who are more likely to have biked than their same-age peer group.

Outdoor Activities Sought While Traveling in Past Two Years

Motorcycling

Motorcycling on Overnight Tour Trip, Motorcycling - Day Excursion

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



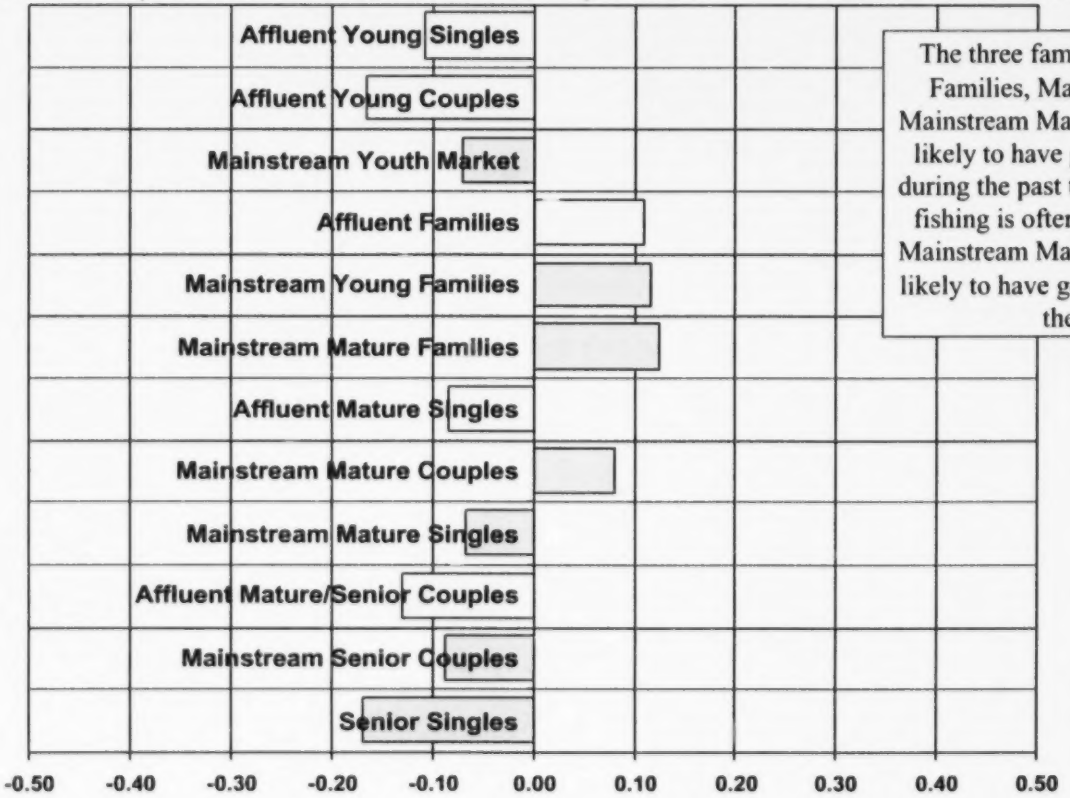
The Mainstream Mature Couples and the Mainstream Mature Families were the most likely to have motorcycled while on a trip during the past two years. However, participation in motor biking exhibits less variation across the market segments than is observed for other outdoor vacation activities.

Outdoor Activities Sought While Traveling in Past Two Years

Fishing

Salt Water Fishing, Fresh Water Fishing, Motor-boating

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



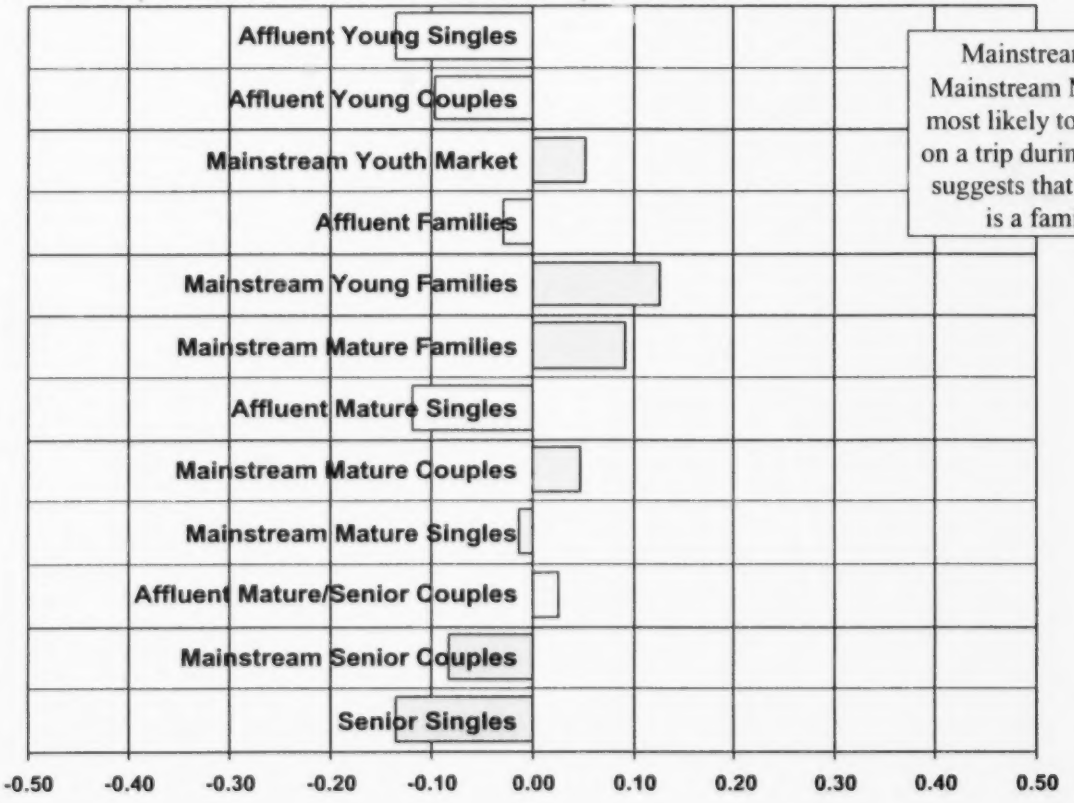
The three family segments (i.e., Affluent Families, Mainstream Young Families, Mainstream Mature Families) were the most likely to have gone fishing while on a trip during the past two years. This indicates that fishing is often a family vacation activity. Mainstream Mature Couples were also more likely to have gone fishing while on a trip in the last two years.

Outdoor Activities Sought While Traveling in Past Two Years

Hunting

Hunting for Big Game; Hunting for Small Game

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



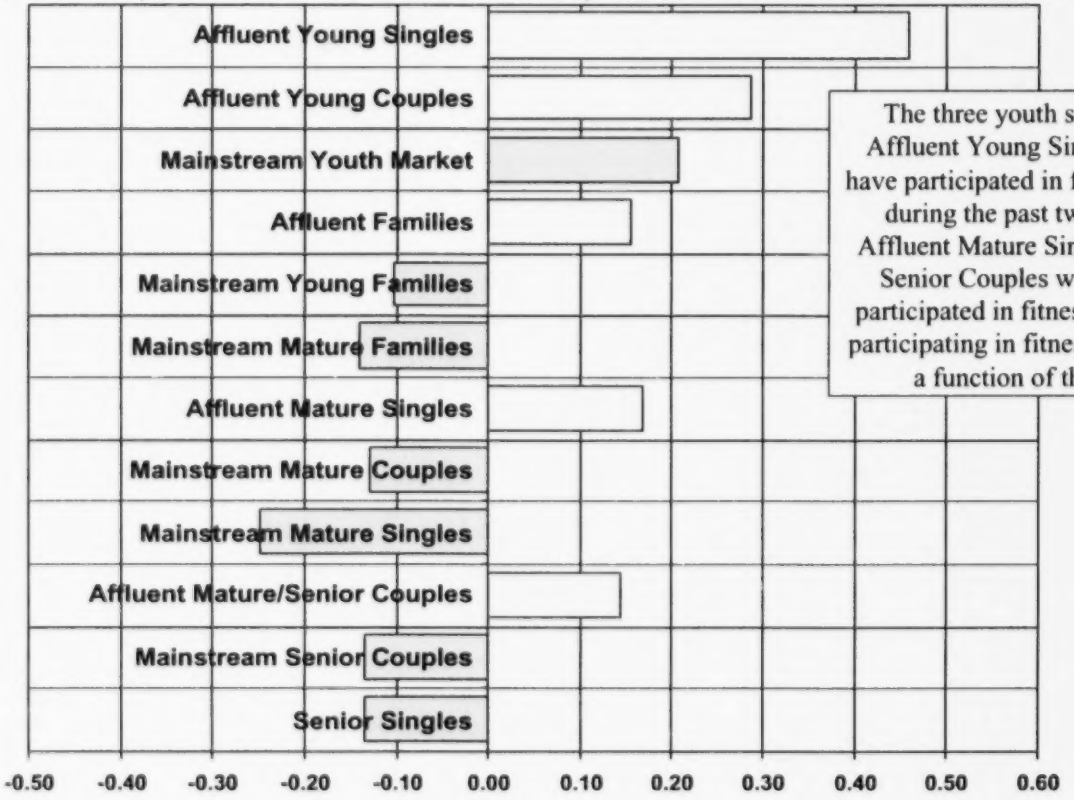
Mainstream Young Families and Mainstream Mature Families were the most likely to have gone hunting while on a trip during the past two years. This suggests that hunting, not like fishing, is a family vacation activity.

Outdoor Activities Sought While Traveling in Past Two Years

Fitness

Jogging Outdoors, Working Out in a Fitness Centre

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



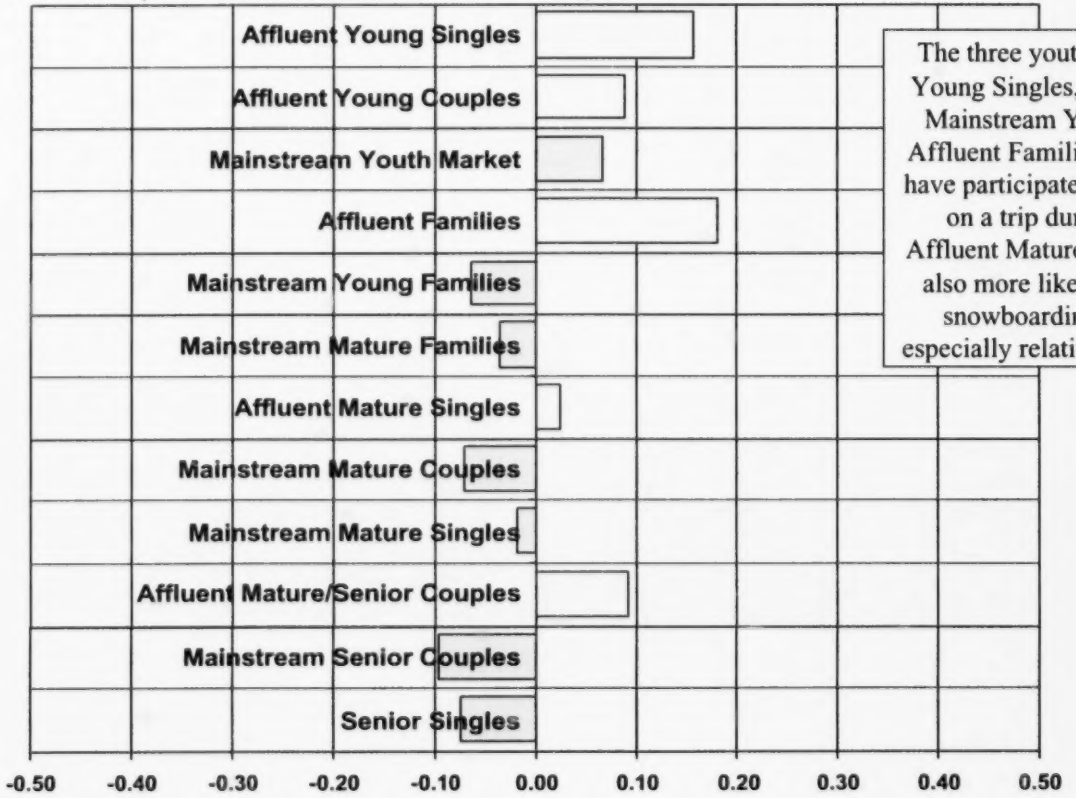
The three youth segments, and especially the Affluent Young Singles, were the most likely to have participated in fitness activities while on a trip during the past two years. Affluent Families, Affluent Mature Singles and Affluent Mature and Senior Couples were also more likely to have participated in fitness activities. The likelihood of participating in fitness activities tends to decline as a function of the age of the respondent.

Outdoor Activities Sought While Traveling in Past Two Years

Cross-Country and Downhill Skiing

Cross-County Skiing, Downhill Skiing

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



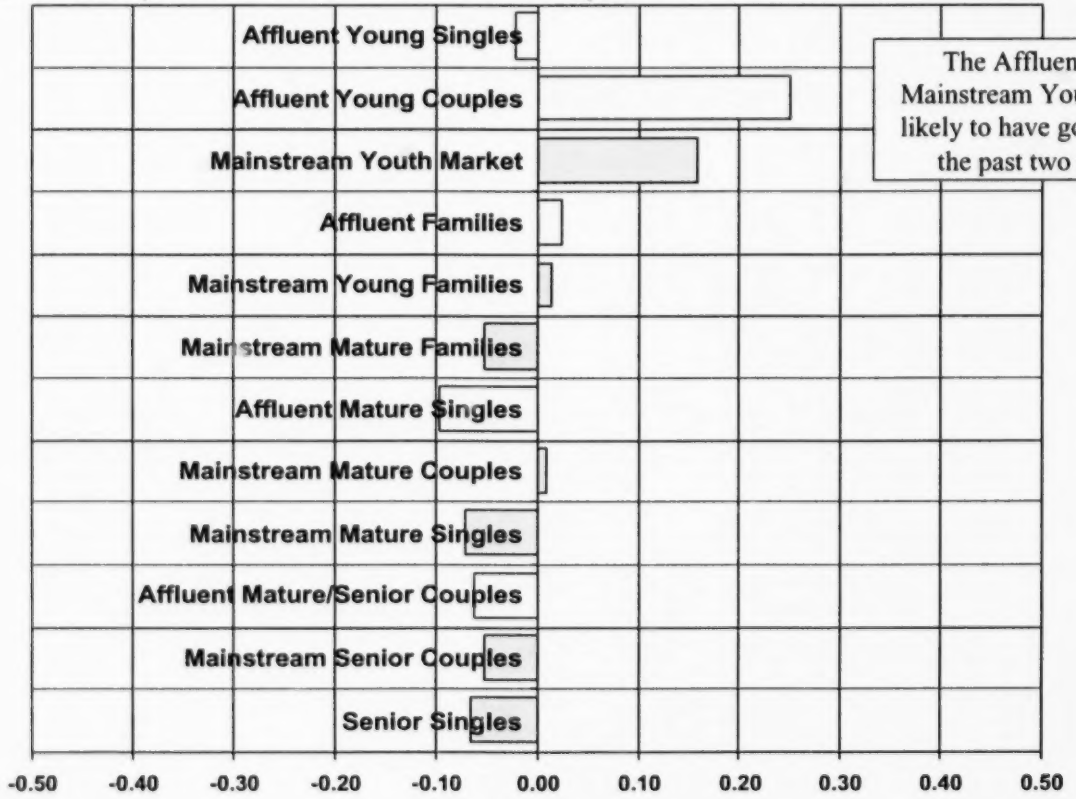
The three youth segments (i.e., Affluent Young Singles, Affluent Young Couples, Mainstream Youth Market) as well the Affluent Families were the most likely to have participated in skiing activities while on a trip during the past two years. Affluent Mature and Senior Couples were also more likely to have gone skiing or snowboarding in the last two years, especially relative to their same-age peers.

Outdoor Activities Sought While Traveling in Past Two Years

Snowmobiling

Snowmobiling as an Overnight Tour Trip, Snowmobiling on Organized Trails

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



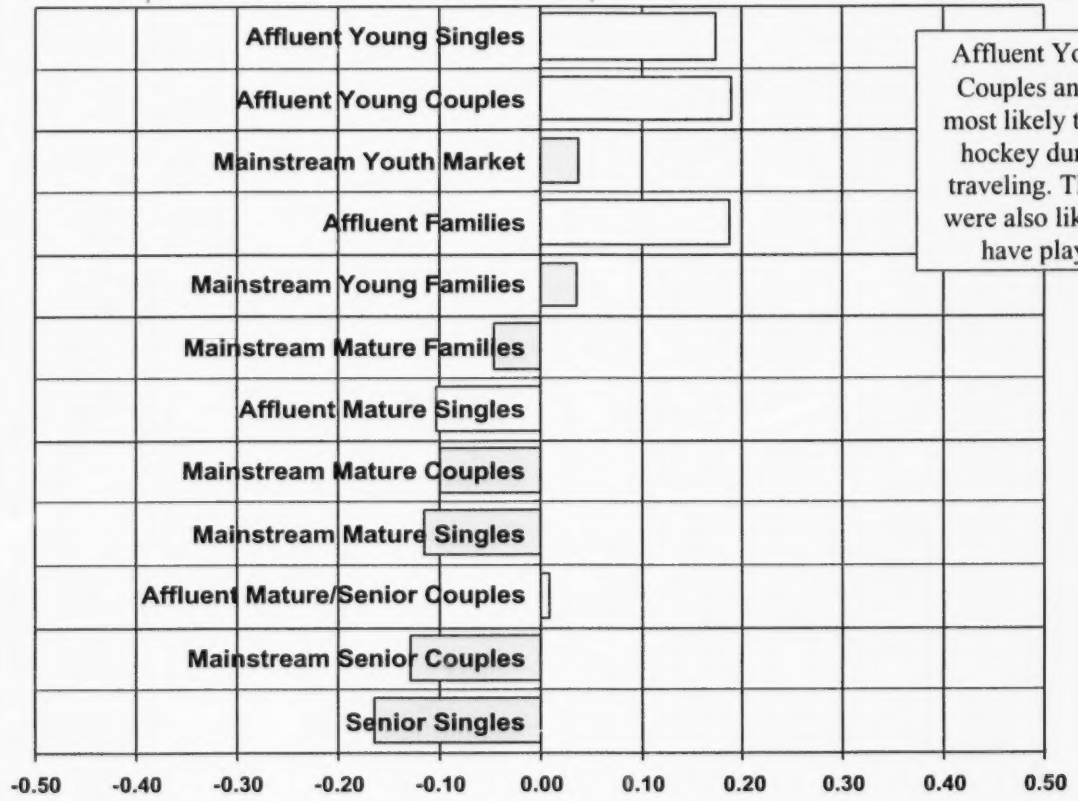
The Affluent Young Couples and Mainstream Youth Market were the most likely to have gone snowmobiling during the past two years while traveling.

Outdoor Activities Sought While Traveling in Past Two Years

Skating & Hockey

Ice Skating, Playing Ice Hockey, In-Line Skating or Rollerblading

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



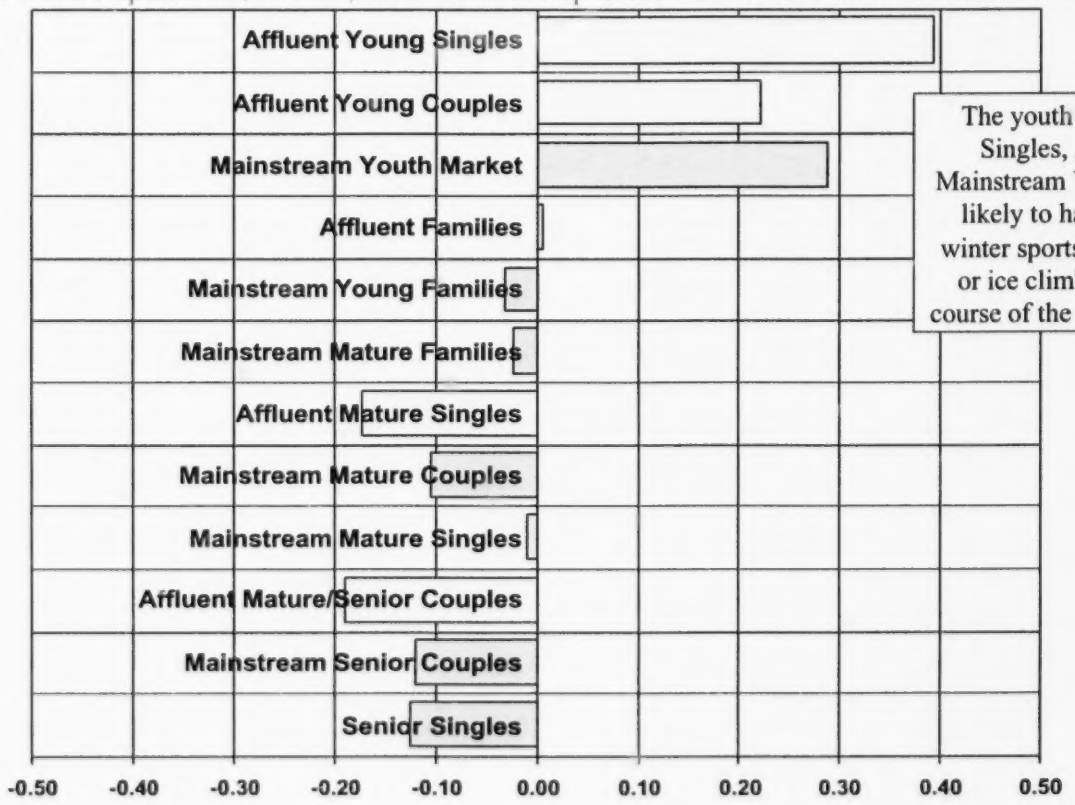
Affluent Young Singles, Affluent Young Couples and Affluent Families were the most likely to have gone skating or played hockey during the past two years while traveling. The Mainstream Youth Market were also likely to have gone skating or to have played hockey while on a trip.

Outdoor Activities Sought While Traveling in Past Two Years

Extreme Winter Sports

Rock Climbing, Ice Climbing, Heli-Skiing, Snowboarding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



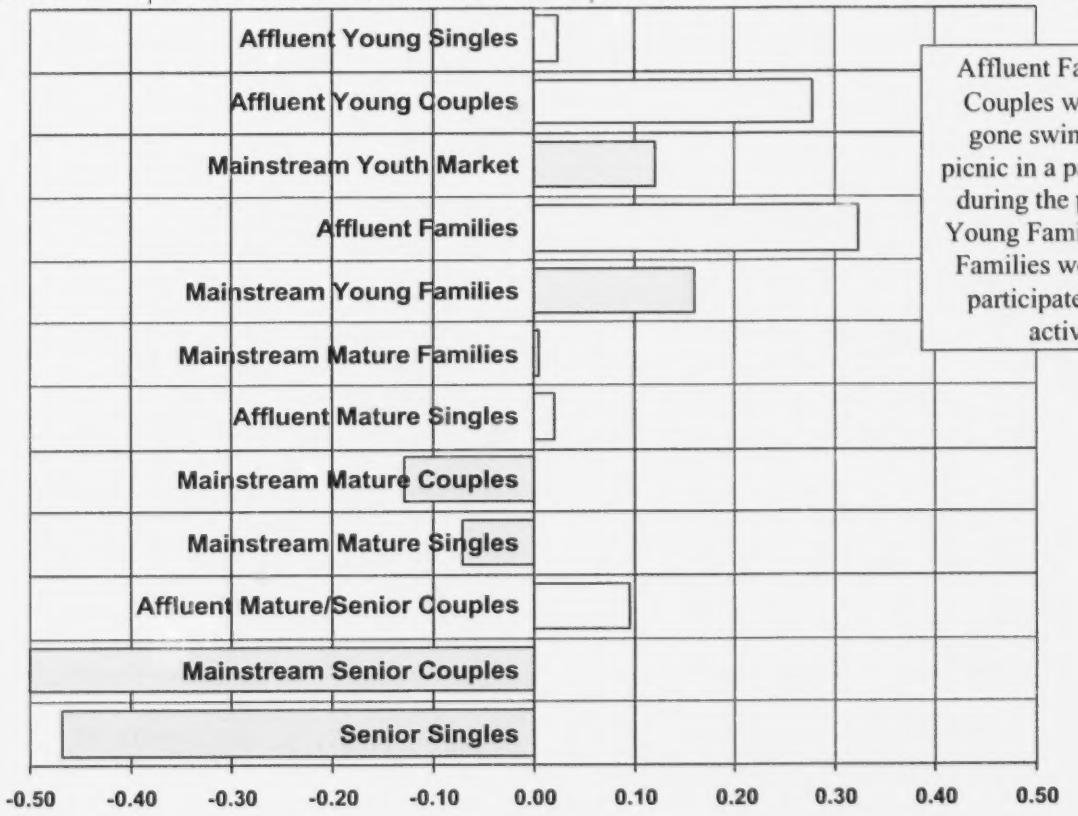
The youth segments (Affluent Young Singles, Affluent Young Couples, Mainstream Youth Market) were the most likely to have participated in extreme winter sports such as snowboarding, rock or ice climbing or heli-skiing over the course of the last two years while on a trip.

Outdoor Activities Sought While Traveling in Past Two Years

Swimming & Sunbathing

Sunbathing or sitting on a beach, Swimming in an ocean, Swimming in a lake, Picnic in park setting

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



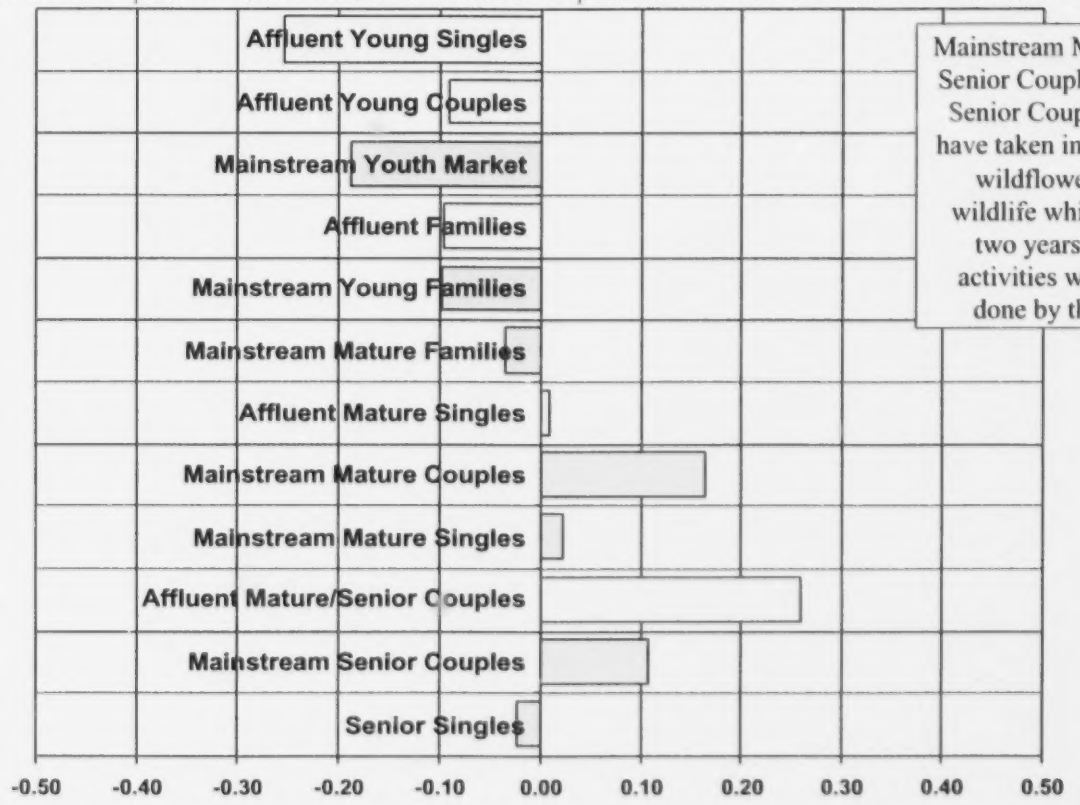
Affluent Families and Affluent Young Couples were the most likely to have gone swimming, sunbathed or had a picnic in a parking setting while on a trip during the past two years. Mainstream Young Families and Mainstream Mature Families were also more likely to have participated in these sorts of outdoor activities while traveling.

Outdoor Activities Sought While Traveling in Past Two Years

Nature Sight-Seeing

Wildflower & Flora Viewing, Other Wildlife Viewing, Bird Watching

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



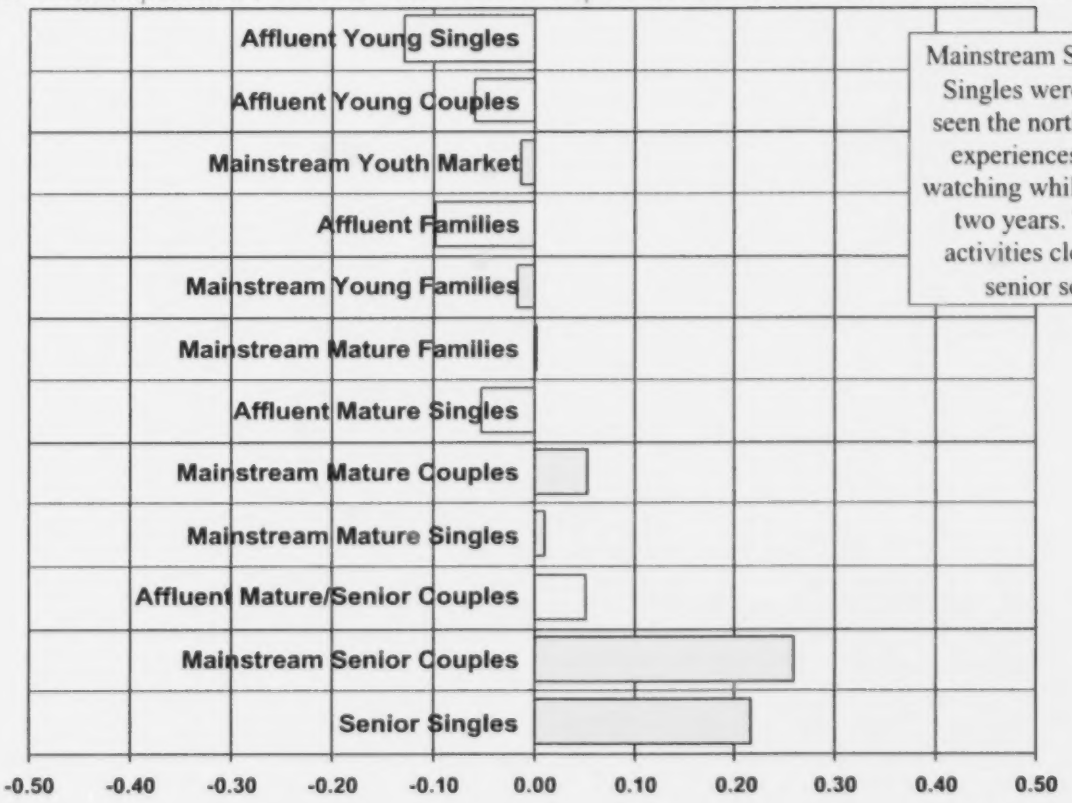
Mainstream Mature Couples, Mainstream Senior Couples and Affluent Mature and Senior Couples were the most likely to have taken in nature's beauty by viewing wildflowers, flora, birds and other wildlife while on a trip during the past two years. These types of outdoor activities were much less likely to be done by the three youth segments.

Outdoor Activities Sought While Traveling in Past Two Years

Natural Phenomena

Seeing the Northern Lights or Other Arctic Experiences, Whale Watching

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Mainstream Senior Couples and Senior Singles were the most likely to have seen the northern lights or other arctic experiences or to have gone whale watching while on a trip during the past two years. These types of outdoor activities clearly appeal to the more senior sectors of the market.

Section Thirteen

Cultural & Entertainment Activities While Traveling

Cultural & Entertainment Activities While Traveling

- Key Findings -

Travelers were more likely to have participated in cultural and entertainment activities than outdoor activities during the past two years. Dining, shopping and leisure reading were the most frequently pursued forms of entertainment while traveling. Going to movies, visiting museums, art galleries and zoos, attending local festivals or fairs and seeing natural wonders were also frequent cultural and entertainment pursuits. At least in part, the high incidence of these sorts of activities reflects the fact that they are readily available at most destinations.

Americans were more likely to have pursued 26 of 57 cultural activities including visiting zoos, aquariums, and theme parks, visiting historical sites, museums and aboriginal cultural attractions and events, attending professional sporting events, and visiting casinos and horse races. The types of cultural and entertainment activities pursued by Americans (relative to Canadians) suggest that Americans are more interested in (their) history and are often attracted to types of entertainment that provide excitement.

Cultural and entertainment activities that are more likely to be pursued in the next two years than the past two years are often unique to a given area (e.g., seeing natural sites such as Niagara Falls, experiencing French Canadian culture, visiting amusement and movie theme parks), or distinctive events (e.g., attending a national or international sporting event, attending musical festivals, carnivals, literary festivals, film festivals). This suggests that there is a strong, emerging desire for novelty in future cultural and entertainment attractions.

The types of cultural and entertainment attractions which were pursued vary widely across the 12 market segments. For example, educational attractions (e.g., museums, art galleries) and fine arts (ballet, opera) tend to appeal to the better educated and more affluent sectors of the market; professional sporting events, concerts, carnivals and festivals appeal most to the younger sectors of the market; theme parks, aquariums, zoos and planetariums appeal most to the young families (those with children under 13); and casino gambling and horse racing appeal mostly to the mature and senior segments of the market.

Cultural & Entertainment Activities While Traveling

- Research Method -

In the mailback survey, those who had traveled during the past two years were asked which of 57 cultural & entertainment activities they had participated in while on a trip over the course of the last two years (Note: see pages 348 to 350 for a list of these activities).

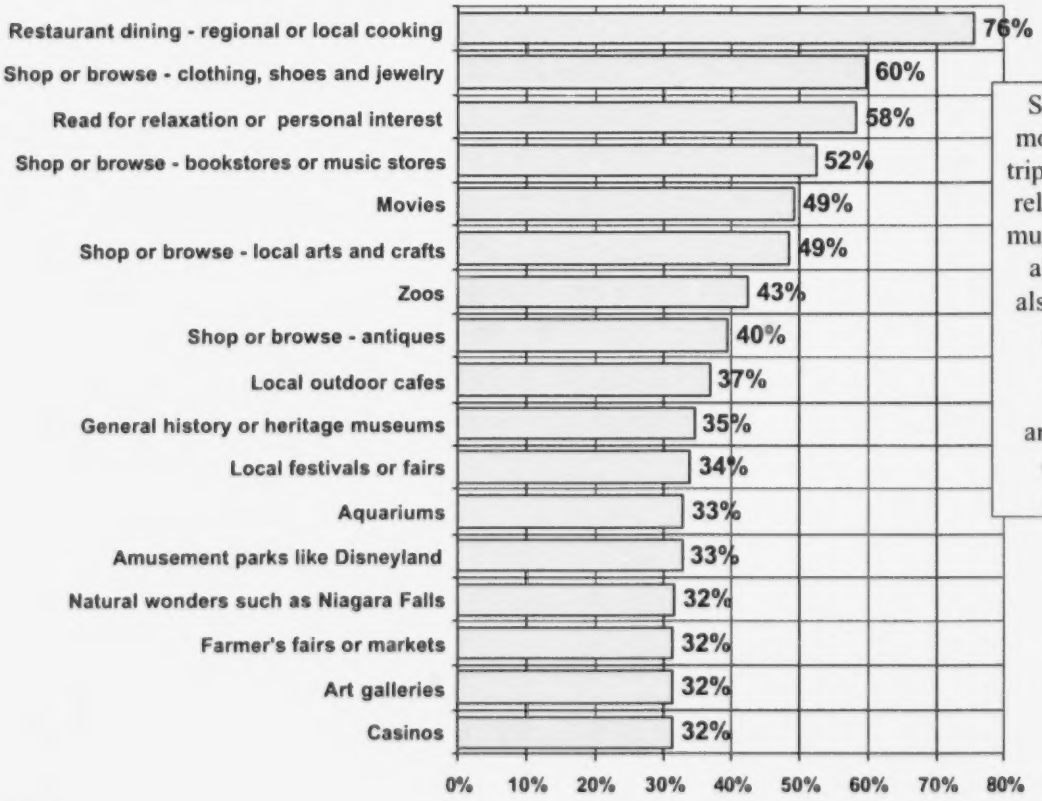
They were also asked which of these same cultural and entertainment activities they were likely to pursue over the course of the next two years.

The cultural and entertainment vacation activities sought during the last two years were factor analysed to identify general types of cultural and entertainment activities sought during travel.

The likelihood that various general types of cultural and entertainment activities had been pursued during the past two years was examined by country and market segment.

Cultural & Entertainment Activities Sought By More Than 30 % of the Adult Population During Travel in the Past two years

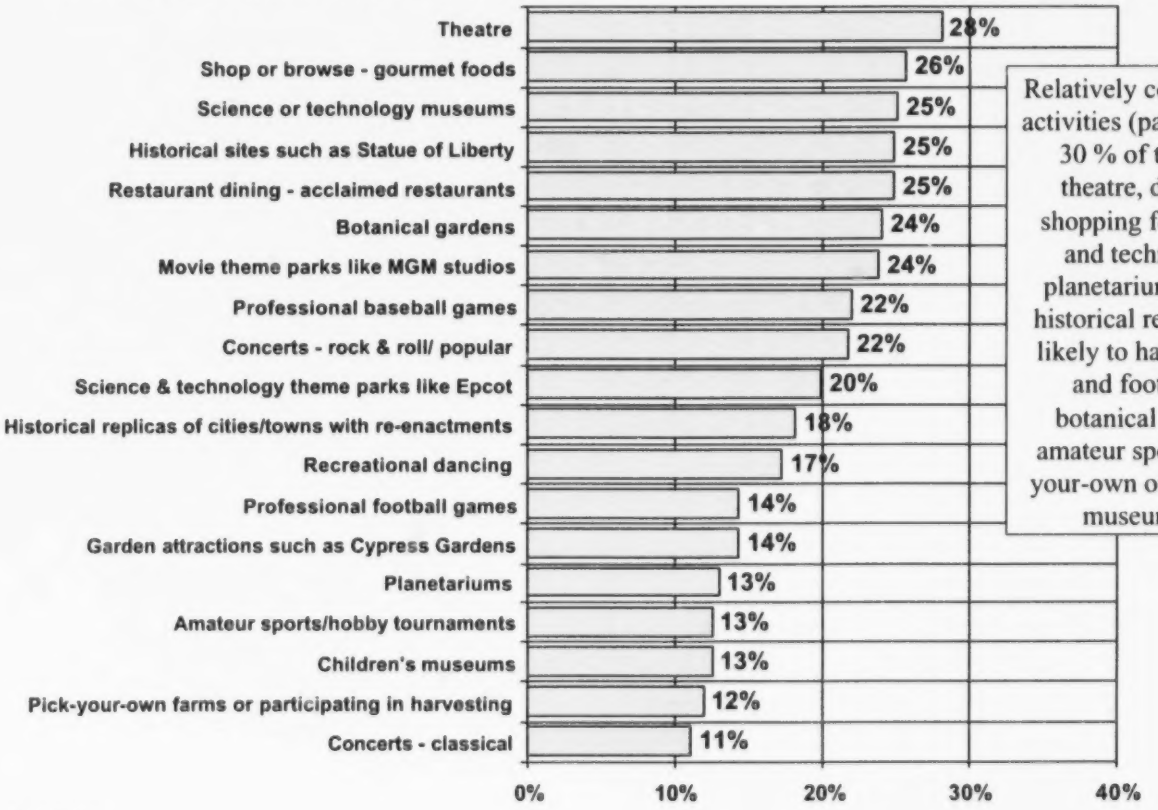
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Shopping and dining activities were the most frequent activities participated in on trips during the past two years. Reading for relaxation, going to movies, visiting zoos, museums, aquariums and art galleries were also common activities. Travelers were also likely to have attended local festivals and fairs, farmer's fairs and markets. Seeing natural wonders (e.g., Grand Canyon, Niagara Falls), visiting amusement parks (e.g., Disneyland) and casinos were also relatively common entertainment pursuits during travel.

Cultural & Entertainment Activities Sought By Between 10 % and 30 % of the Adult Population During Travel in the Past two years

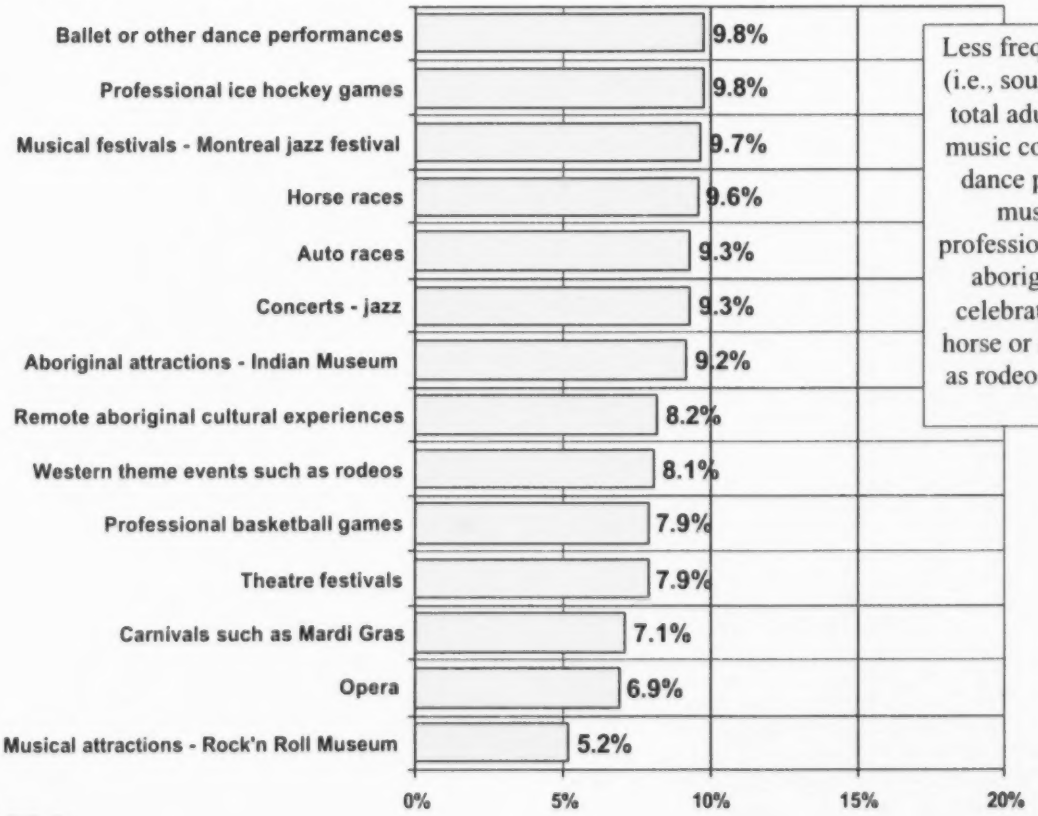
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relatively common cultural and entertainment activities (participated in by between 10 % and 30 % of travelers) include attending live theatre, dining in acclaimed restaurants, shopping for gourmet food, visiting science and technology museums, theme parks, planetariums and visiting historical sites or historical re-enactments. Travelers were also likely to have attended professional baseball and football games, musical concerts, botanical gardens and garden attractions, amateur sports/art/hobby tournaments, pick-your-own or participatory farms or children's museums during the past two years.

Cultural & Entertainment Activities Sought By Between 5 % and 10 % of the Adult Population During Travel in the Past two years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Less frequent cultural and entertainment pursuits (i.e., sought out by between 5 % and 10 % of the total adult travelers) include attending classical music concerts, jazz concerts, the ballet or other dance performances, and the opera, attending musical and theatre festivals, attending professional hockey and basketball games, seeing aboriginal attractions (i.e. Indian Museum), celebrations and cultural experiences, going to horse or auto races or western theme events such as rodeos, or visiting musical attractions such as the Rock 'n Roll museum.

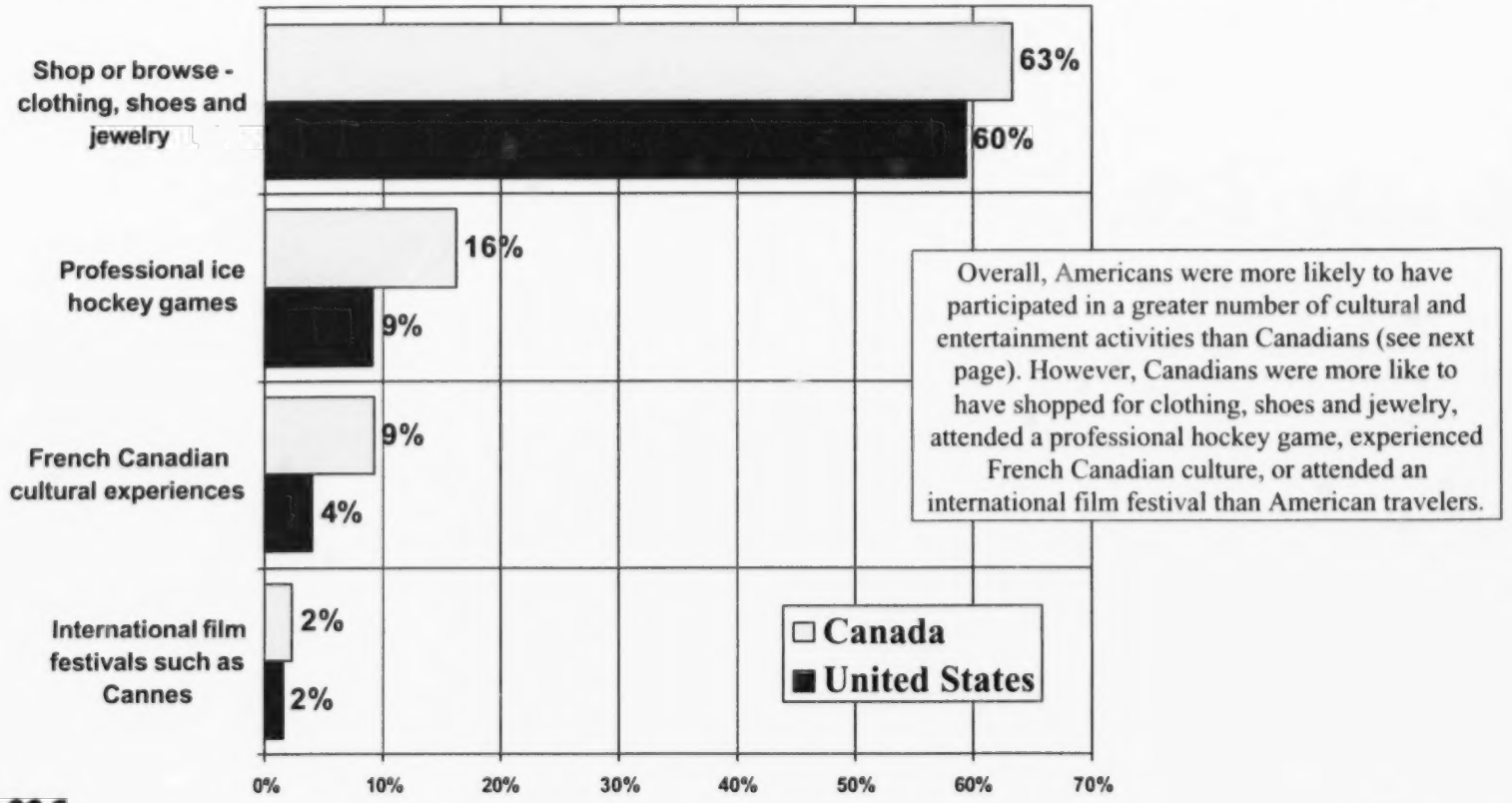
Cultural & Entertainment Activities Sought By Less Than 5 % of the Adult Population During Trips in the Past two years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Cultural and entertainment activities which were attended by less than 5 % of the travelers include experiencing French Canadian culture, going to a professional golf, figure skating tournament or other national or international sporting event, and attending a literary or international film festival. In part, the low incidence of these types of cultural experiences reflect the fact that many of these experiences and events were not readily accessible to most travelers.

Cultural & Entertainment Activities More Likely to Have Been Sought By Canadians During Travel in the Past two years

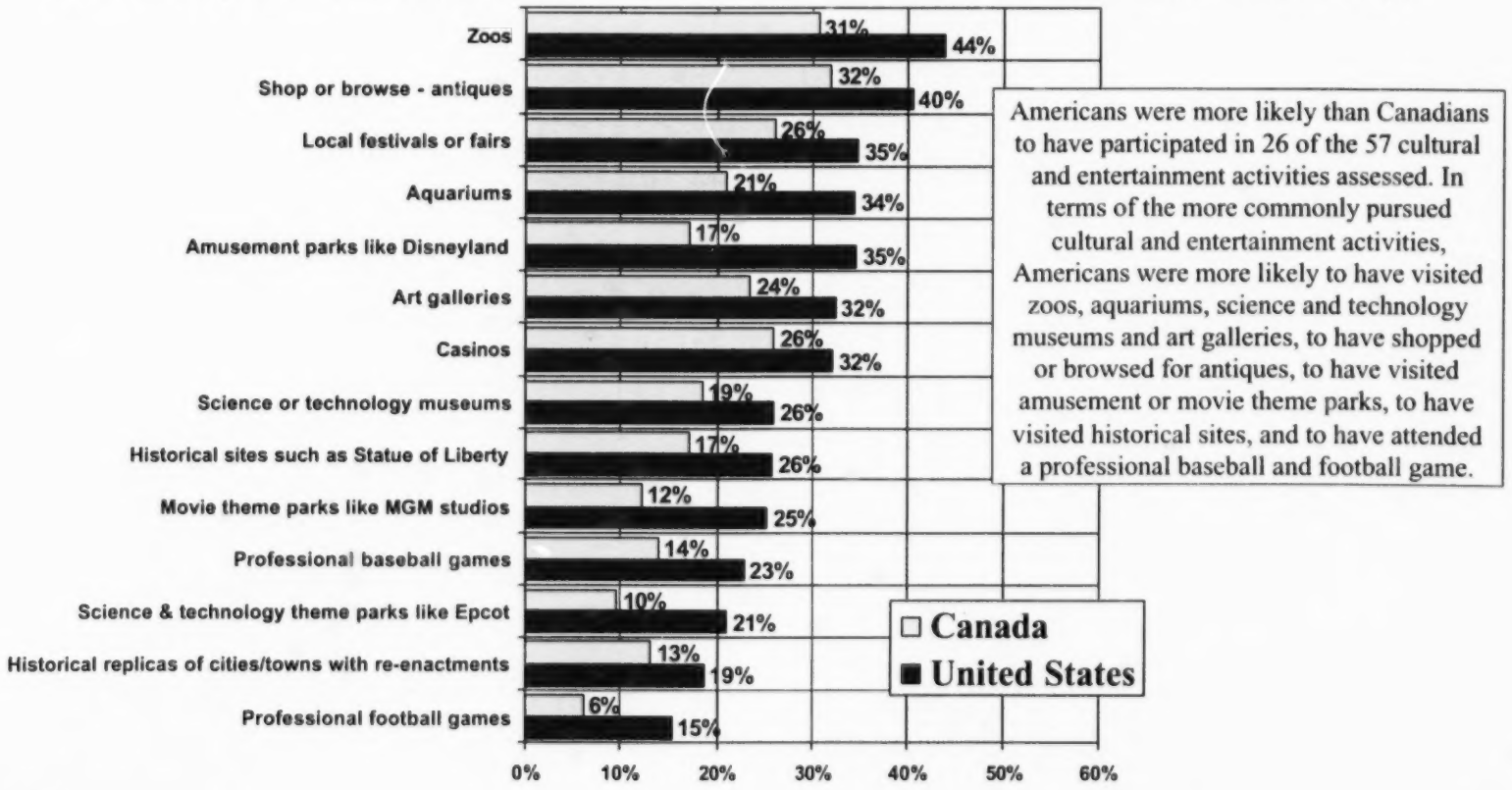
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Overall, Americans were more likely to have participated in a greater number of cultural and entertainment activities than Canadians (see next page). However, Canadians were more like to have shopped for clothing, shoes and jewelry, attended a professional hockey game, experienced French Canadian culture, or attended an international film festival than American travelers.

Cultural & Entertainment Activities More Likely to Have Been Sought By Americans During Travel in the Past two years

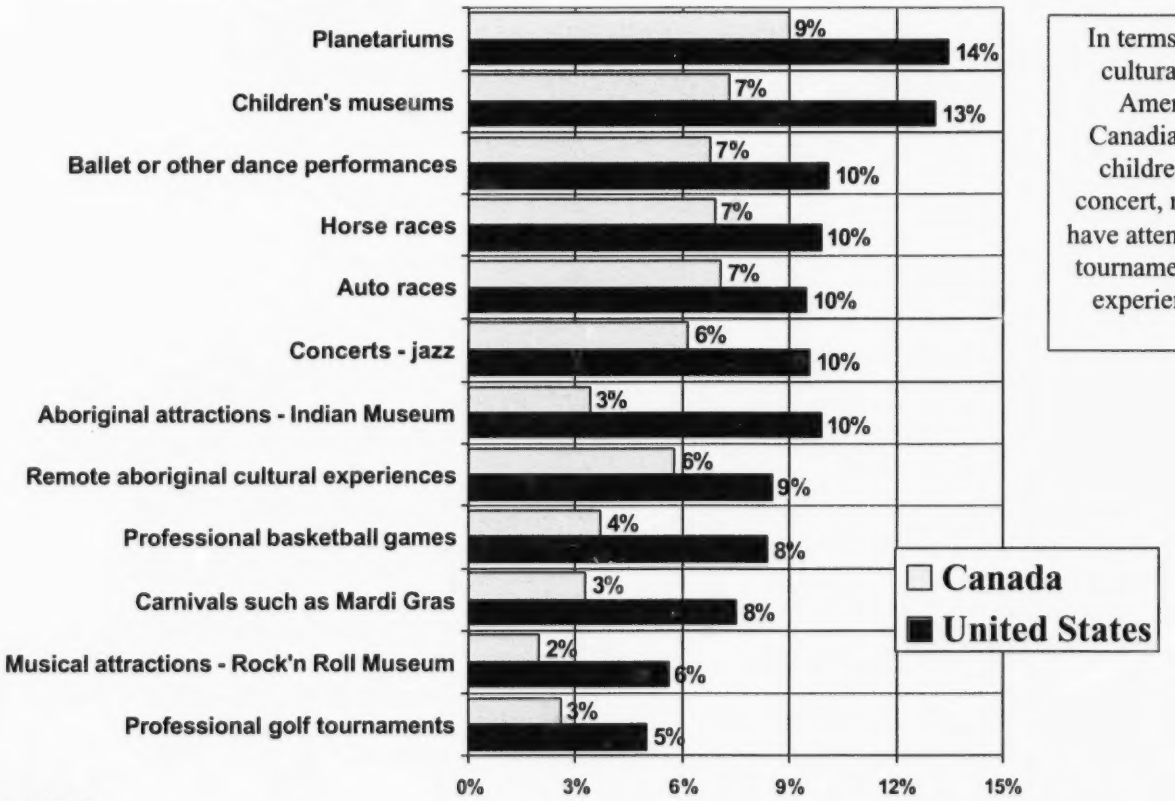
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Americans were more likely than Canadians to have participated in 26 of the 57 cultural and entertainment activities assessed. In terms of the more commonly pursued cultural and entertainment activities, Americans were more likely to have visited zoos, aquariums, science and technology museums and art galleries, to have shopped or browsed for antiques, to have visited amusement or movie theme parks, to have visited historical sites, and to have attended a professional baseball and football game.

Cultural & Entertainment Activities More Likely to Have Been Sought By Americans During Travel in the Past two years

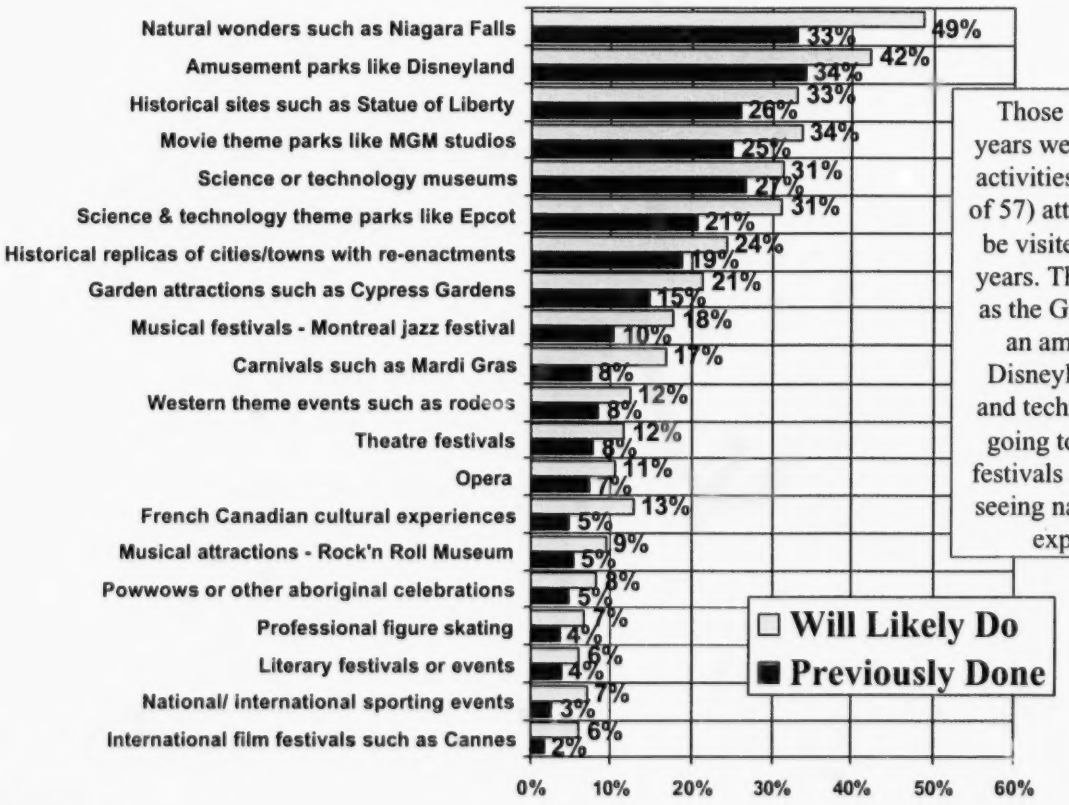
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



In terms of the less commonly pursued cultural and entertainment activities, Americans were more likely than Canadians have gone to a planetarium, children's museum, the ballet, a jazz concert, musical attraction or carnival, to have attended professional basketball, golf tournaments, horse races and and to have experienced aboriginal attractions and celebrations.

Most Common Cultural & Entertainment Activities More Likely to Be Sought In Next Two Years Than Last two years

Base: Those Having Both Taken a Trip and Are Likely to Take Trip: Canada & U.S.



Those likely to take a trip within the next two years were asked what cultural and entertainment activities they would be likely to do. Twenty (out of 57) attractions were significantly more likely to be visited on future trips, relative to the last two years. These include seeing natural wonders such as the Grand Canyon and Niagara Falls, going to an amusement or movie theme park such as Disneyland or MGM studios, visiting a science and technology museum, visiting historical sites, going to the opera, carnivals, theatre or literary festivals and events or international film festivals, seeing national or international sporting event, or experiencing French Canadian culture.

Factor Analysis of Cultural & Entertainment Vacation Experiences

The cultural and entertainment vacation activities sought in the last two years were submitted to a factor analysis to identify general categories of cultural and entertainment activities sought during travel. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories of cultural and entertainment activities that tend to be sought by individuals while traveling. The factors may be used to generate factor scores which measure the degree to which these general categories of cultural and entertainment activities have been pursued by various segments of the travel market. This analysis identified the following 15 activity types:

Shopping & Dining

- **Shopping or browsing**: Clothing, shoes, jewelry; Bookstores and music stores; Local arts and crafts; Gourmet food;
  Restaurant dining: Regional or local cooking; Acclaimed restaurants

Museums, Art Galleries & Historical Sites

- General history/heritage museums, Historical sites (e.g., Statue of Liberty, Fort Alamo), Science & technology museums, Historical replicas/re-enactments, Art galleries

High Arts

- Opera, Classical concerts, Ballet or other dance performance, Live theatre

Factor Analysis of Cultural & Entertainment Vacation Experiences (Continued)

Theme Parks

- Movie theme parks like MGM studios, Science & technology theme parks like Epcot, Amusement parks like Disneyland

Professional Sports

- Baseball, Football, Basketball, Ice hockey, Professional Golf

Zoos, Aquariums, Planetariums

- Zoos, Aquariums, Children's Museums, Planetariums

Agricultural and Local Fairs

- Farmer's fair or market, Local festivals or fairs, Pick-your-own farms or participating in harvesting, Shop or browse for antiques

Concerts, Carnivals or Festivals

- Music festivals, Carnivals such Mardi Gras, Jazz concerts, Rock & roll concerts, Musical attractions like Rock'n Roll Museum

Aboriginal Cultural Experiences

- Aboriginal cultural experiences in remote settings, Powwows or other aboriginal celebrations, Aboriginal attractions such as the Indian Museum

Factor Analysis of Cultural & Entertainment Vacation Experiences (Continued)

Gardening and Natural Wonders

- Botanical gardens, Garden attractions such as Cypress Gardens or Tivoli Park, Natural wonders such as Niagara Falls or the Grand Canyon

Cultural Festivals

- Literary festivals or events, Theatre festivals, International film festivals

National/International Sporting Events

- National/International sporting events, Professional figure skating

Gambling and Racing

- Casino gambling and horse racing

Rodeo and Auto Racing

- Western theme events such as rodeos or the Calgary Stampede, Auto racing

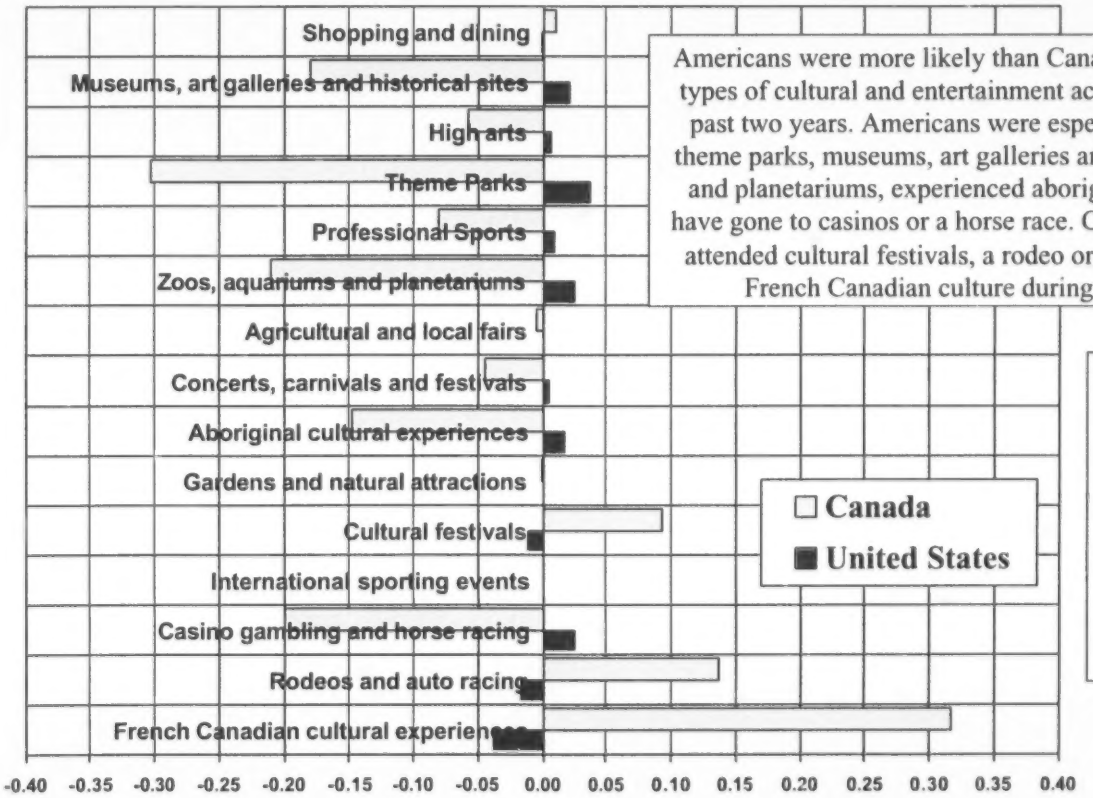
French Canadian Cultural Experiences

- French Canadian cultural experiences

Cultural and Entertainment Activities Sought in Past Two Years of Travel

Canada versus United States

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Americans were more likely than Canadians to have participated in most types of cultural and entertainment activities while travelling during the past two years. Americans were especially more likely to have visited theme parks, museums, art galleries and historical sites, zoos, aquariums and planetariums, experienced aboriginal culture or attractions, and to have gone to casinos or a horse race. Canadians were more likely to have attended cultural festivals, a rodeo or auto race, or to have experienced French Canadian culture during the past two years of travel.

Technical Note

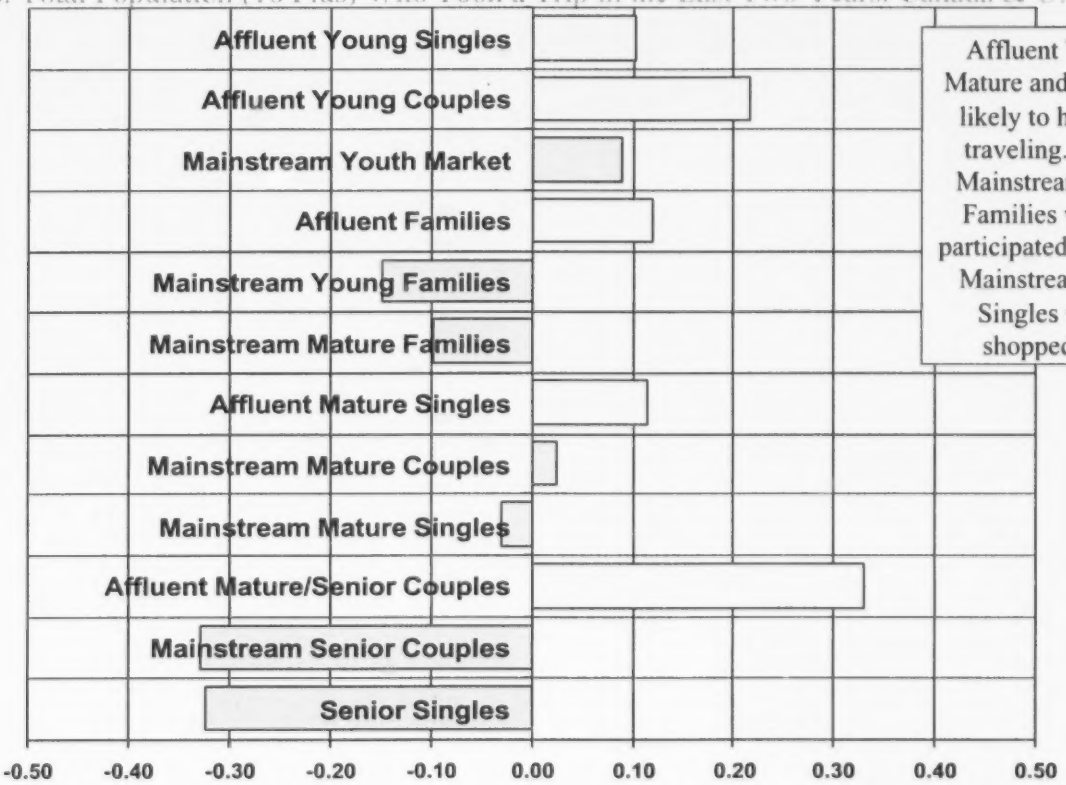
The factor scores for each type of cultural and entertainment activity were determined by the weighted sum of all activities. The weighting is determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation on "1". A value of "0" means that this type of traveler exhibited an average tendency to pursue a particular type of cultural or entertainment activity. Positive values indicate that the traveler type was more likely to have pursued this type of activity. Negative values indicate that the traveler type was less likely to have pursued this type of activity.

Cultural & Entertainment Activities in Past Two Years

Shopping & Dining

Shopping or browsing for clothes, shoes, jewelry, books, music, local arts & crafts, gourmet food; Dining: Regional and local cooking; Acclaimed restaurants

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



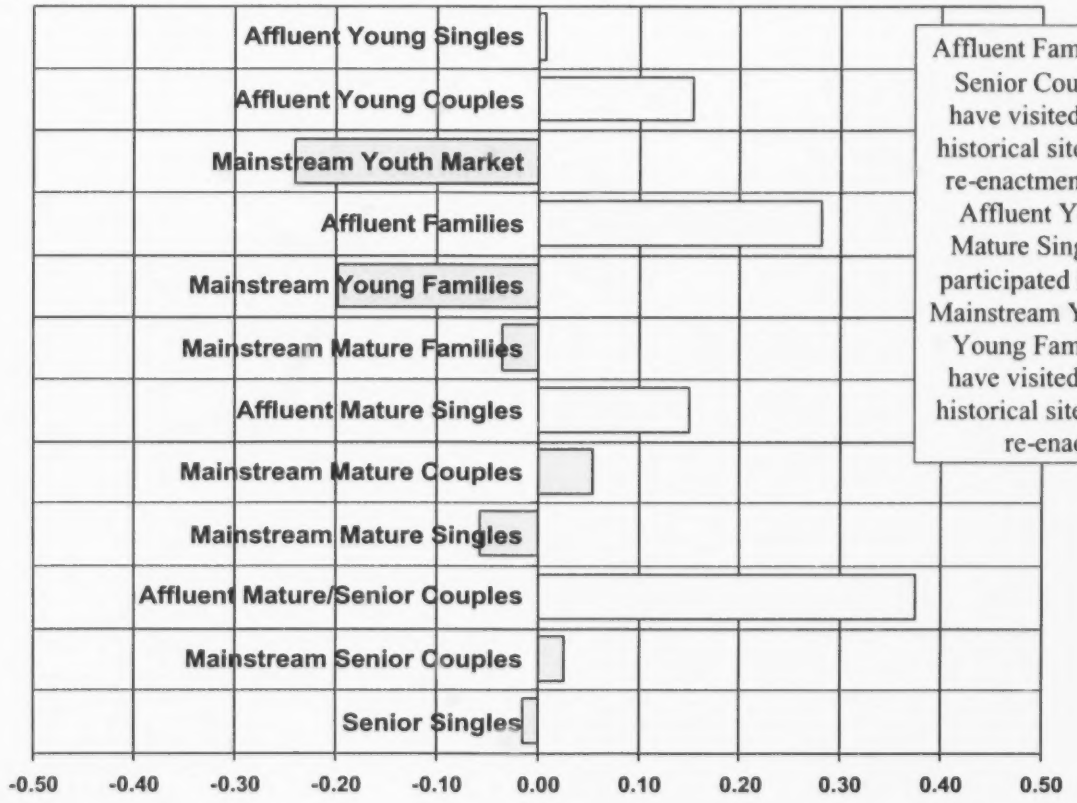
Affluent Young Couples and Affluent Mature and Senior Couples were the most likely to have shopped and dined while traveling. Affluent Young Singles, the Mainstream Youth Market and Affluent Families were also more likely to have participated in such entertainment pursuits. Mainstream Senior Couples and Senior Singles were the least likely to have shopped and dined while traveling.

Cultural & Entertainment Activities in Past Two Years

Museums, Art Galleries & Historical Sites

General history/heritage; Science & technology ; Historical sites and Historical Replicas With Re-enactments; Art galleries

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



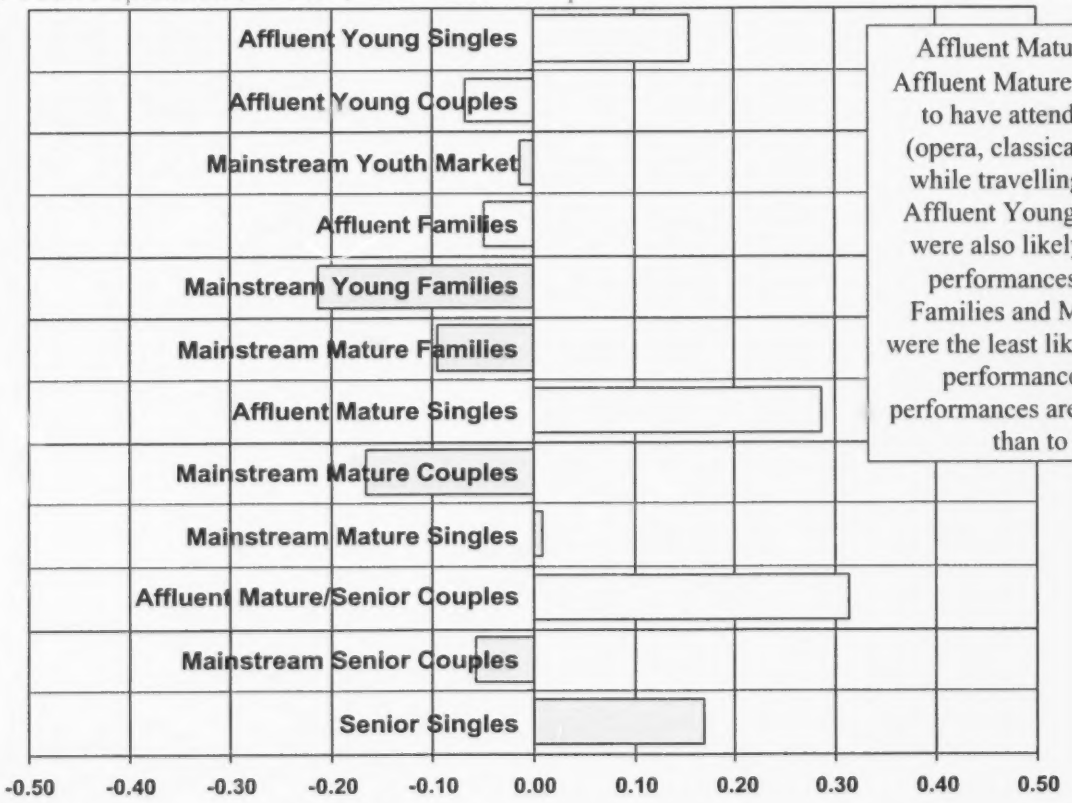
Affluent Families and Affluent Mature and Senior Couples were the most likely to have visited museums, art galleries, and historical sites and historical replicas with re-enactments during the past two years. Affluent Young Couples and Affluent Mature Singles were also likely to have participated in such cultural pursuits. The Mainstream Youth Market and Mainstream Young Families were the least likely to have visited museums, art galleries, and historical sites and historical replicas with re-enactments on recent trips.

Cultural & Entertainment Activities in Past Two Years

High Arts

Opera, Classical music concerts, Ballet or other dance performances, Live theatre

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



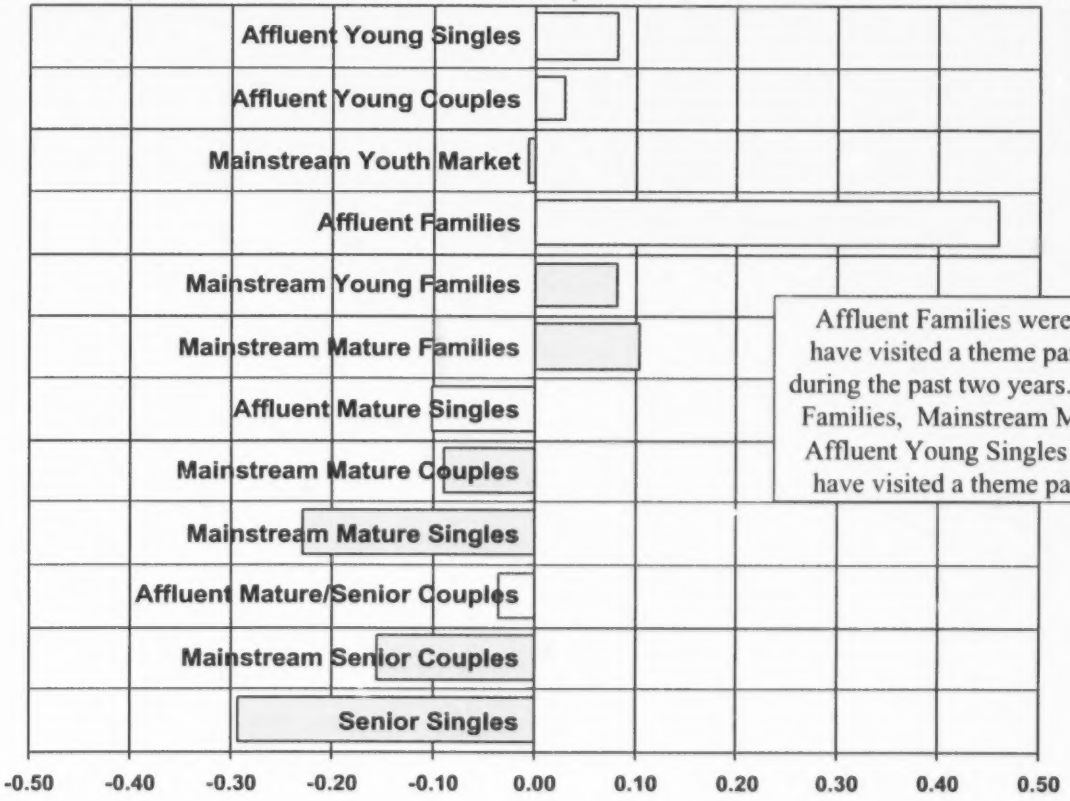
Affluent Mature and Senior Couples and Affluent Mature Singles were the most likely to have attended high arts performances (opera, classical music, ballet, live theatre) while travelling during the past two years. Affluent Young Singles and Senior Singles were also likely to have attended high arts performances. The Mainstream Young Families and Mainstream Mature Couples were the least likely to have attended high arts performances. Apparently, high arts performances are of greater interest to singles than to couples or families.

Cultural & Entertainment Activities in Past Two Years

Theme Parks

Movie Theme Parks, Science & Technology Theme Parks, Amusement Theme Parks

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



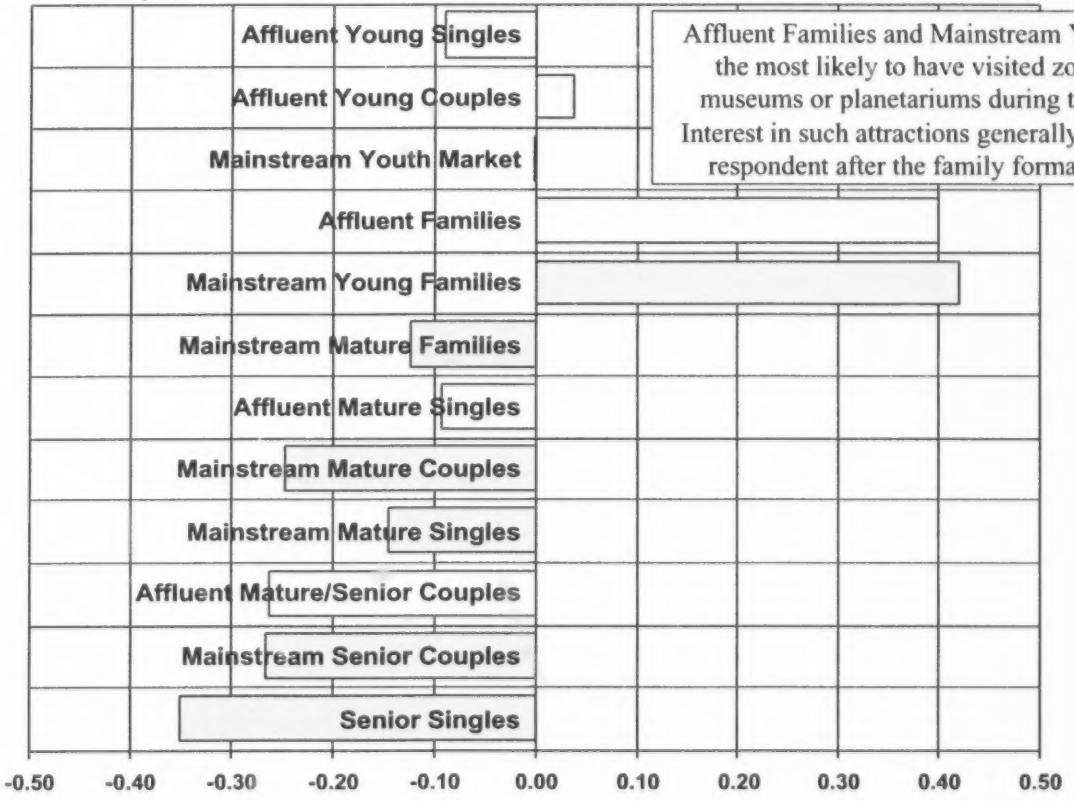
Affluent Families were the most likely to have visited a theme park while travelling during the past two years. Mainstream Young Families, Mainstream Mature Families and Affluent Young Singles were also likely to have visited a theme park while on a trip.

Cultural & Entertainment Activities in Past Two Years

Zoos, Aquariums & Planetariums

Zoos, Aquariums, Children's Museums and Planetariums

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



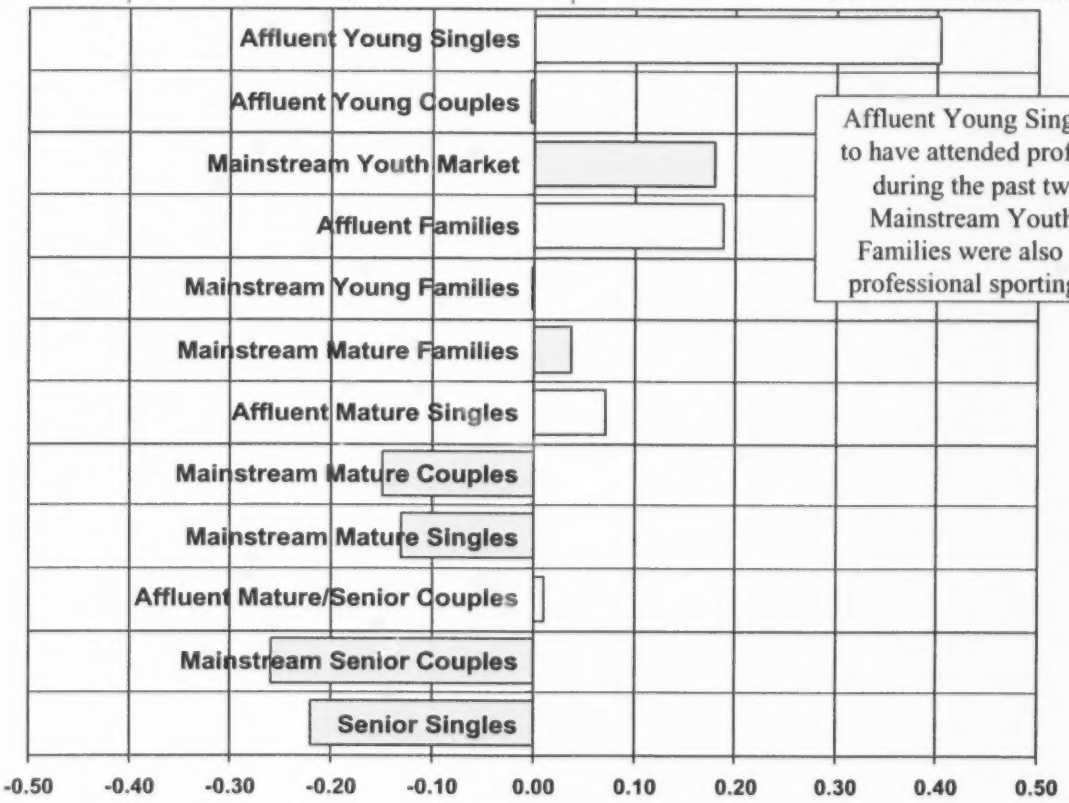
Affluent Families and Mainstream Young Families were clearly the most likely to have visited zoos, aquariums, children's museums or planetariums during the past two years of travel. Interest in such attractions generally declined with the age of the respondent after the family formation stage of the lifecycle.

Cultural & Entertainment Activities in Past Two Years

Professional Sports

Basketball, Baseball, Football, Ice Hockey, Professional Golf

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



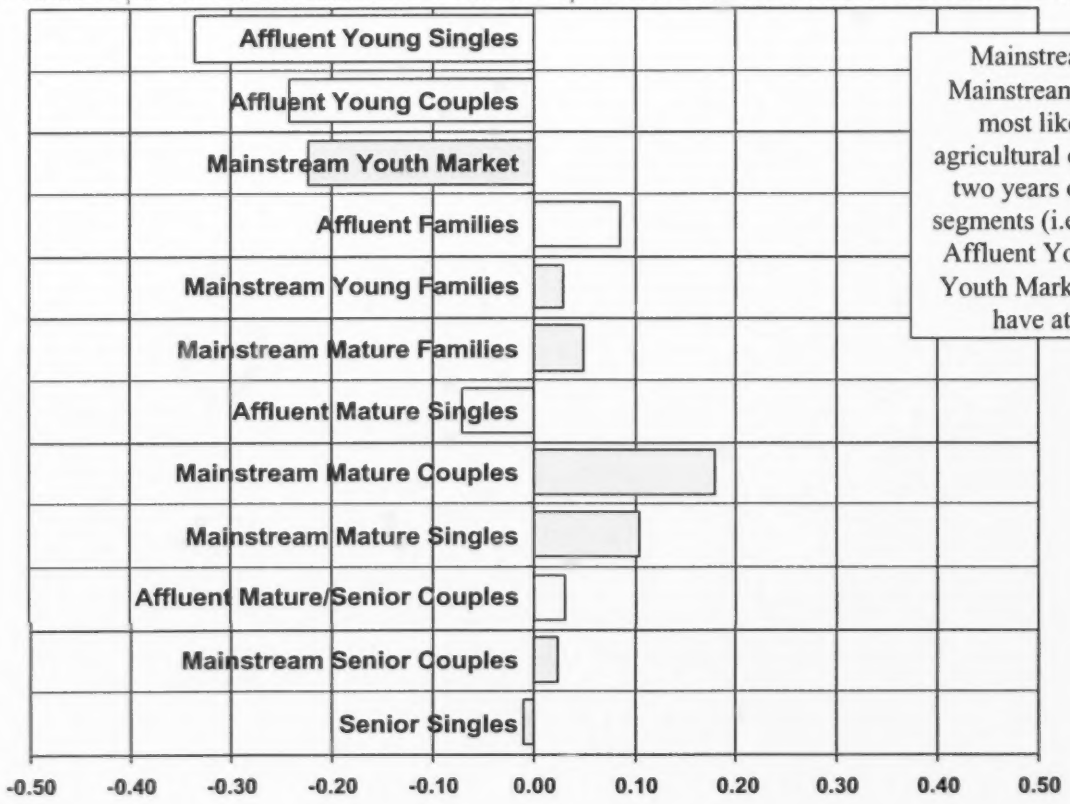
Affluent Young Singles were the most likely to have attended professional sporting events during the past two years of travel. The Mainstream Youth Market and Affluent Families were also likely to have attended professional sporting events while on a trip.

Cultural & Entertainment Activities in Past Two Years

Agricultural & Local Fairs

Farmer's Fair/Market, Local Festival/Fair, Pick-Your-Own/Participatory Farm, Shop for Antiques

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



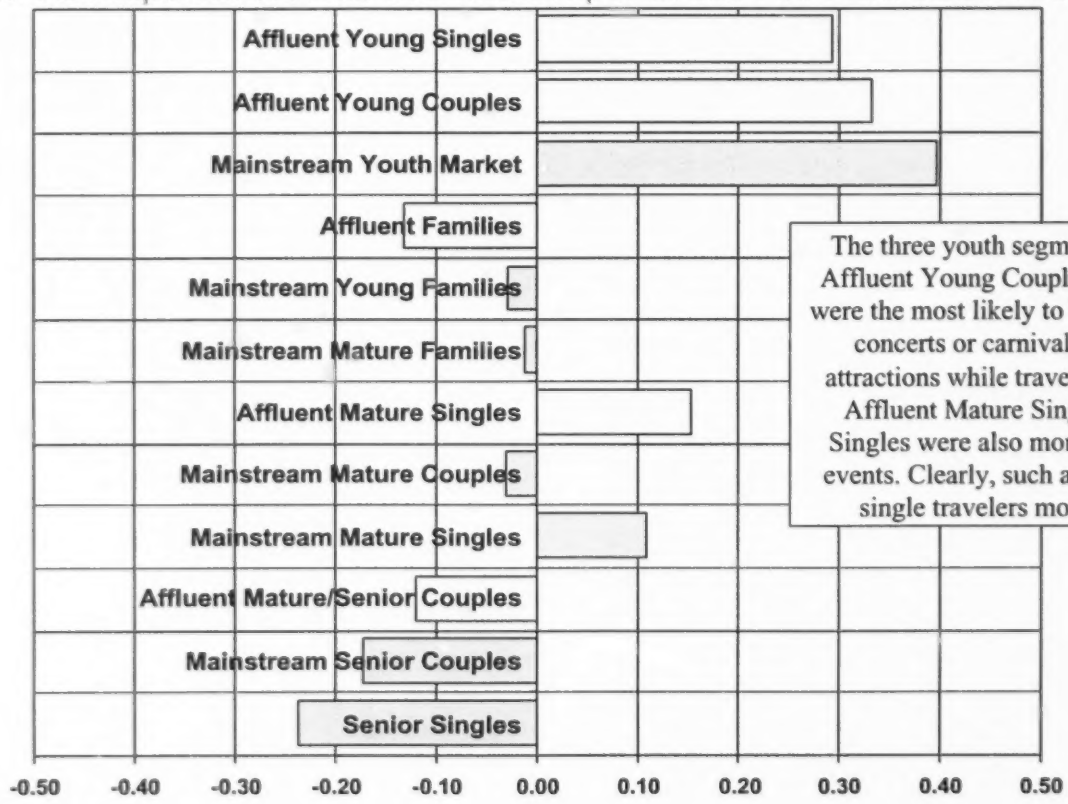
Mainstream Mature Couples and Mainstream Mature Singles were the most likely to have attended an agricultural or local fair during the past two years of travel. The three youth segments (i.e., Affluent Young Singles, Affluent Young Couples, Mainstream Youth Market) were the least likely to have attended such an event.

Cultural & Entertainment Activities in Past Two Years

Concerts, Carnivals, Festival

Musical Festivals, Carnivals, Jazz Concerts, Rock 'n Roll Concerts, Musical Attractions

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



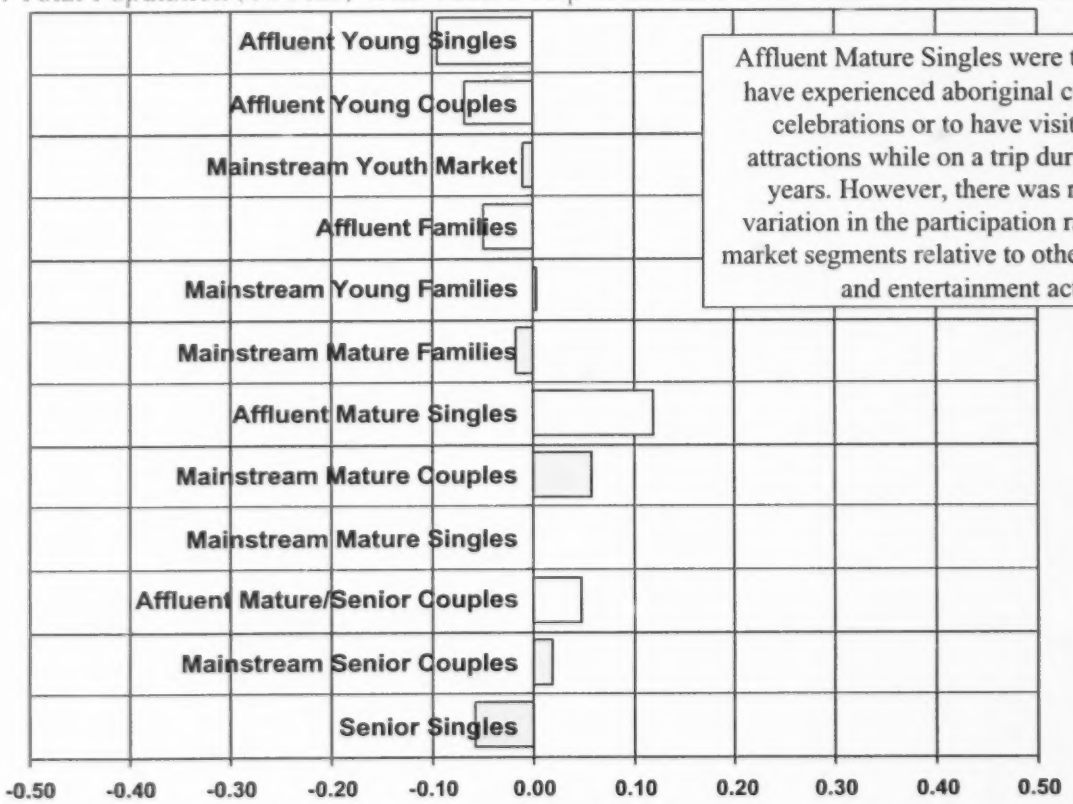
The three youth segments (Affluent Young Singles, Affluent Young Couples, Mainstream Youth Market) were the most likely to have attended musical festivals, concerts or carnivals or to have visited musical attractions while traveling during the past two years. Affluent Mature Singles and Mainstream Mature Singles were also more likely to have attended such events. Clearly, such attractions and events appeal to single travelers more than couples or families.

Cultural & Entertainment Activities in Past Two Years

Aboriginal Cultural Experiences

Aboriginal Cultural Experiences, Aboriginal Celebrations, Aboriginal Attractions

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



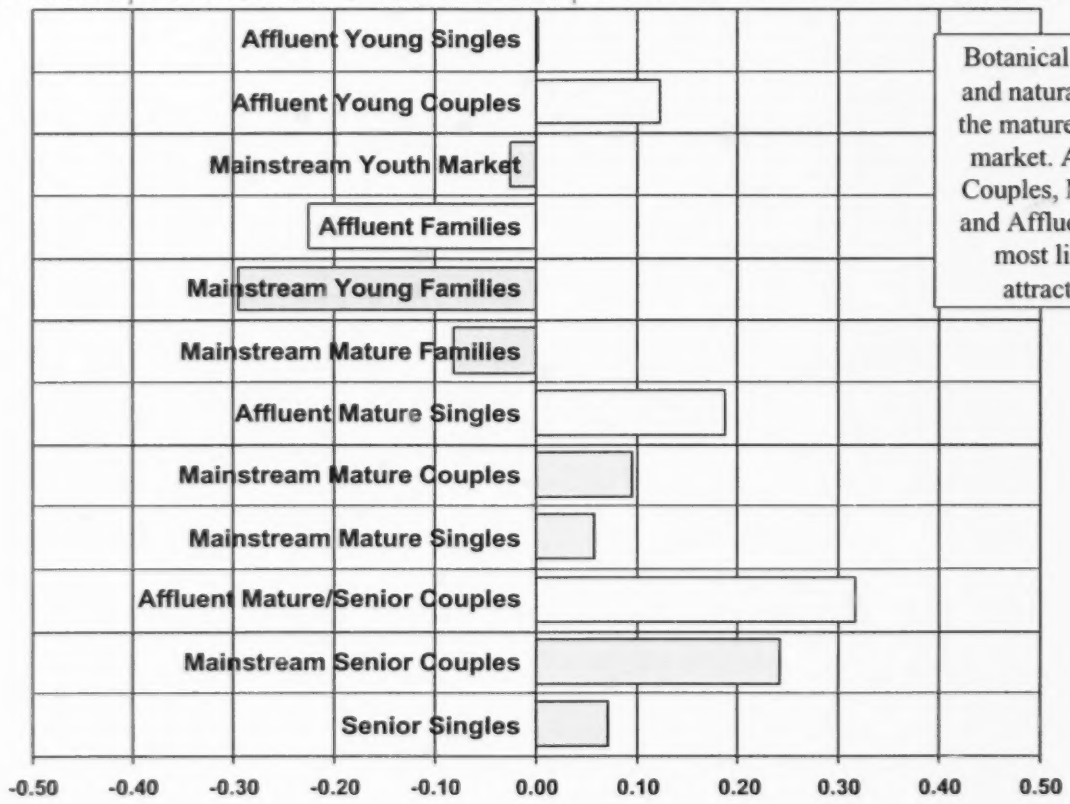
Affluent Mature Singles were the most likely to have experienced aboriginal cultural events or celebrations or to have visited aboriginal attractions while on a trip during the past two years. However, there was relatively little variation in the participation rate across the 12 market segments relative to other types of cultural and entertainment activities.

Cultural & Entertainment Activities in Past Two Years

Gardening and Natural Wonders

Botanical Gardens, Garden Attractions, Natural Wonders (e.g., Niagara Falls)

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



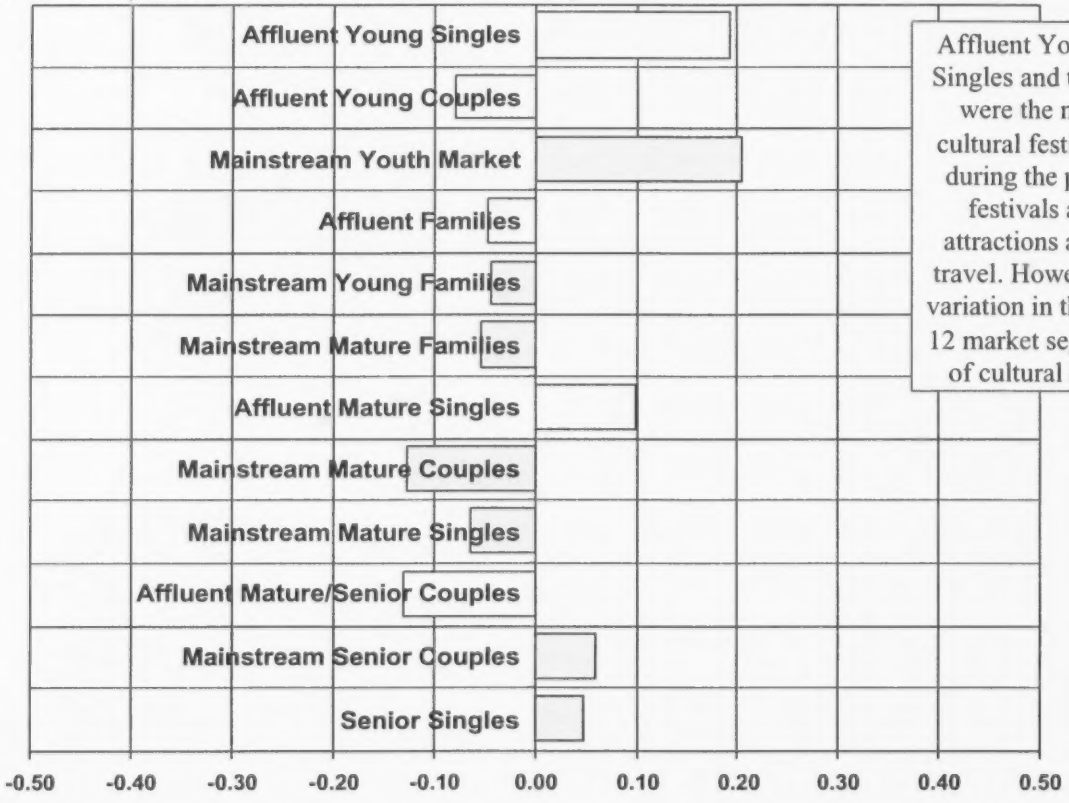
Botanical gardens, garden attractions and natural wonders appeal mostly to the mature and senior segments of the market. Affluent Mature and Senior Couples, Mainstream Senior Couples and Affluent Mature Singles were the most likely to have visited such attractions during recent trips.

Cultural & Entertainment Activities in Past Two Years

Cultural Festivals

Literary Festivals or Events, Theatre Festivals, International Film Festivals

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



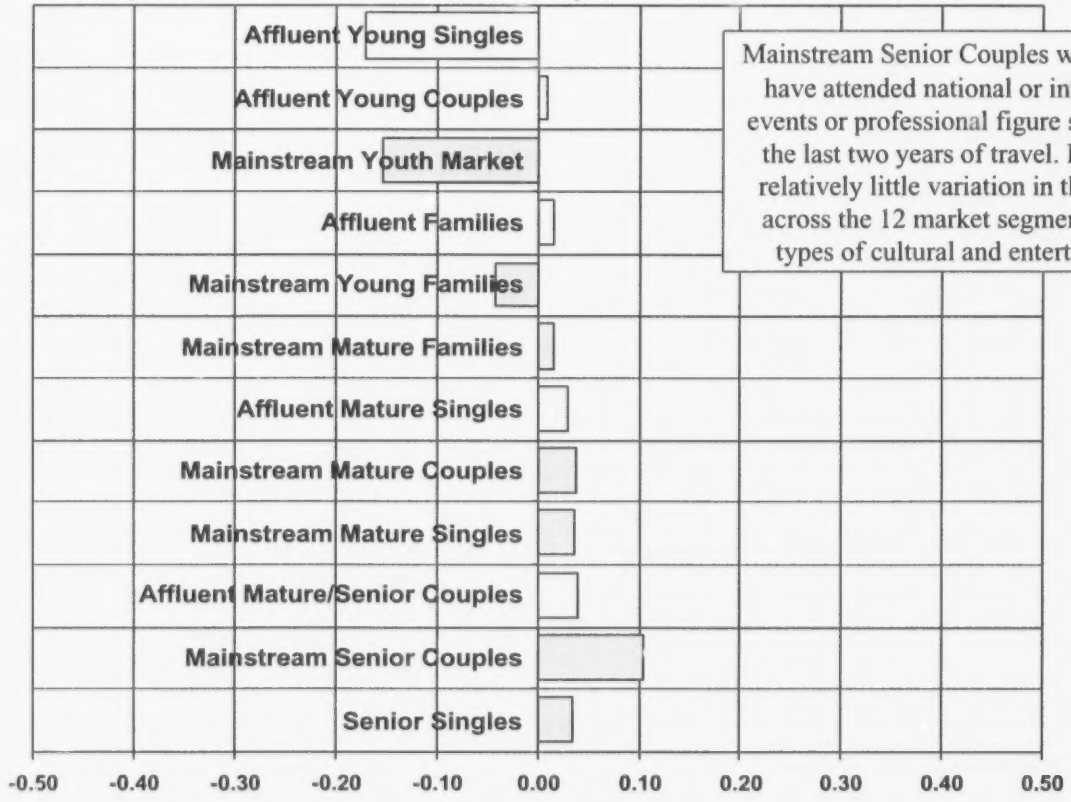
Affluent Young Singles, Affluent Mature Singles and the Mainstream Youth Market were the most likely to have attended cultural festivals or events while on a trip during the past two years. As with other festivals and concerts, these sorts of attractions appeal mostly to singles who travel. However, there was relatively little variation in the participation rate across the 12 market segments, relative to other types of cultural and entertainment activities.

Cultural & Entertainment Activities in Past Two Years

National/International Sporting Events

National/International Sporting Events, Professional Figure Skating

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



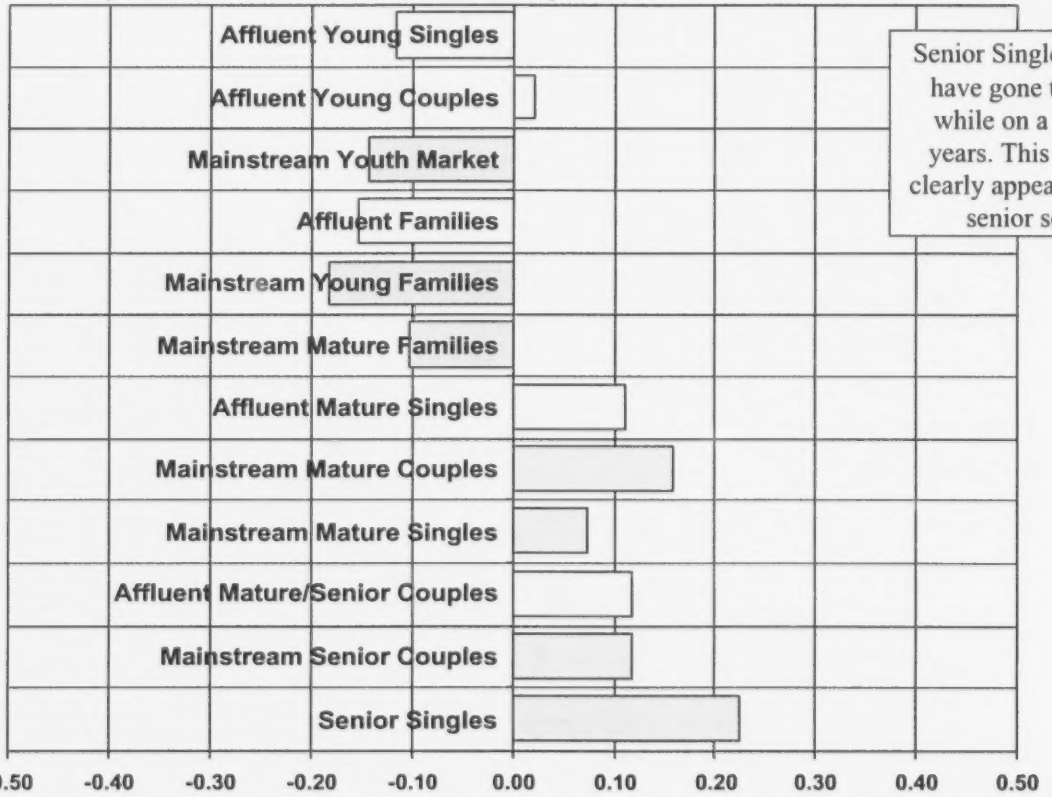
Mainstream Senior Couples were the most likely to have attended national or international sporting events or professional figure skating events during the last two years of travel. However, there was relatively little variation in the participation rate across the 12 market segments, relative to other types of cultural and entertainment activities.

Cultural & Entertainment Activities in Past Two Years

Gambling & Horse Racing

Gambling in Casinos, Horse Racing

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



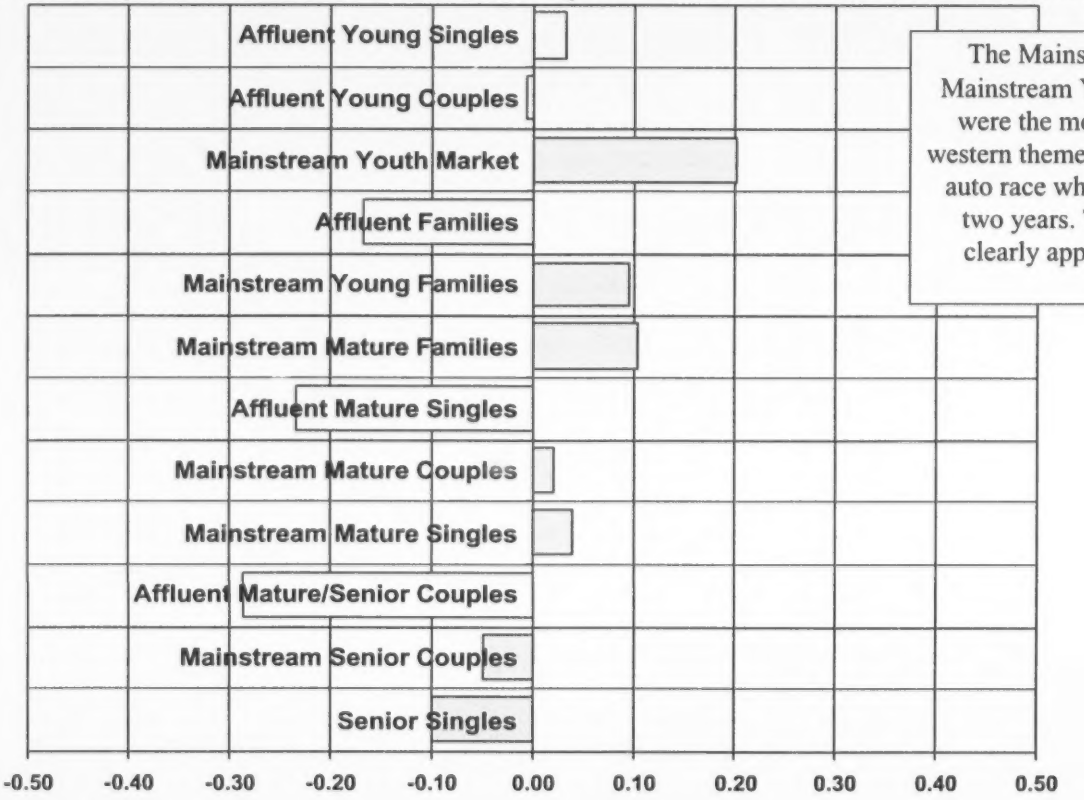
Senior Singles were the most likely to have gone to a casino or horse race while on a trip during the past two years. This sort of vacation activity clearly appeals more to the mature and senior sectors of the market.

Cultural & Entertainment Activities in Past Two Years

Rodeos & Auto Racing

Western Theme Events (e.g., Rodeos), Auto Racing

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



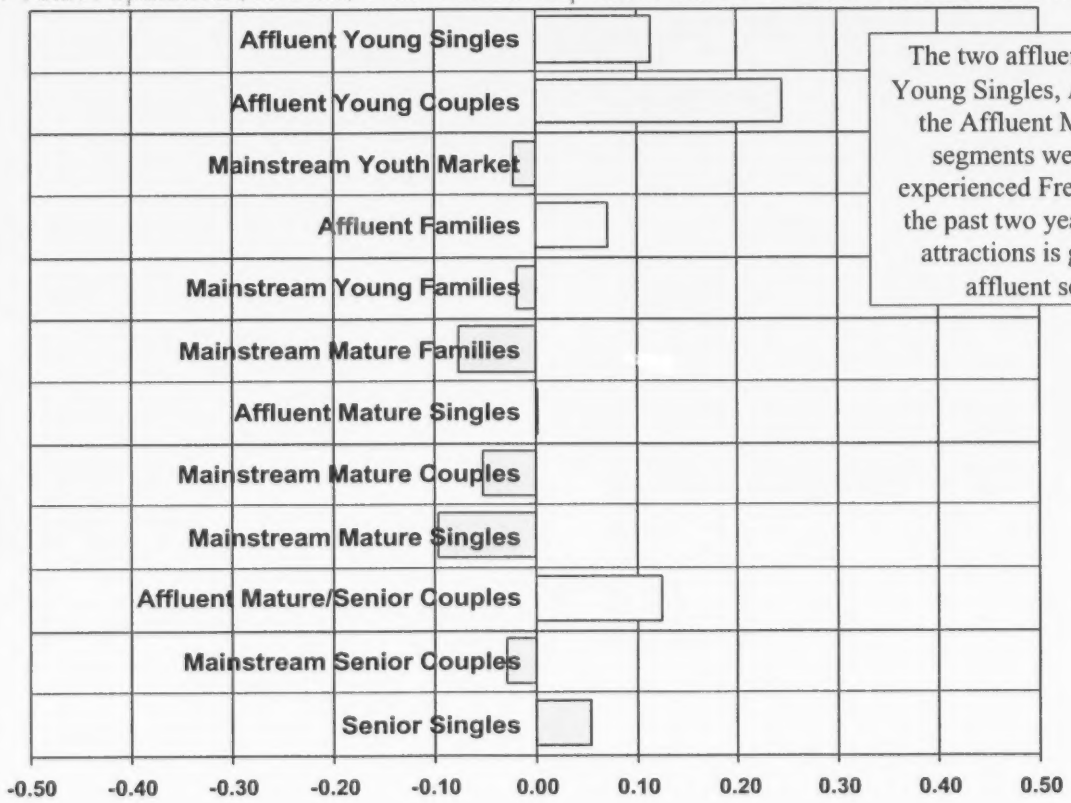
The Mainstream Youth Market and Mainstream Young and Mature Families were the most likely to have attended western theme events such as a rodeo or an auto race while on a trip during the past two years. These types of attractions clearly appeal mostly to mainstream families.

Cultural & Entertainment Activities in Past Two Years

French Canadian Cultural Experiences

French Canadian Cultural Experiences

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



The two affluent youth segments (Affluent Young Singles, Affluent Young Couples) and the Affluent Mature and Senior Couples segments were the most likely to have experienced French Canadian culture during the past two years of travel. Interest in such attractions is generally higher within the affluent segments of the market.

Section Fourteen

Activity-Related Accommodations

Activity Related Accommodations

- Key Findings -

Of the 20 types of activity-related accommodations assessed, travelers were most likely to have stayed in public camp grounds, resorts (during the summer), or a bed and breakfast.

Canadians were more likely than Americans to have camped or stayed in a privately owned cottage or condo. By contrast, Americans were more like to have stayed in a bed and breakfast. There is also a tendency for Canadians to vacation near lakes while Americans are more likely to stay near the ocean. This pattern reflects the relative distribution of the populations of the two countries with Canadians more likely (than Americans) to live near a lake, and Americans more likely (than Canadians) to live near an ocean.

Relative to the last two years, travelers are more likely to stay in a bed and breakfast, a lakeside resort (in the summer), or a ski resort (in the winter). However travelers also expressed greater interest in staying in more exotic types of activity-related accommodations such as wilderness lodges, working farms or guest ranches, gourmet restaurants with accommodations, cooking and wine tasting schools with accommodations and remote fly-in lodges. This latter trend may reflect an increasing interest in more exotic vacation experiences than they have experienced in the past.

Stays in various types of accommodations vary widely across the 12 market segments. For example, the youth markets and mainstream family markets were much more likely to have gone camping than other segments. In general, the more exotic types of accommodations (e.g., cooking and wine schools with accommodations, remote fly-in lodges or outposts, health spas) were more likely to have been utilized by the more affluent segments. This may partially reflect the cost of these sorts of vacations.

Activity Related Accommodations

- Research Method -

In the mailback survey, those who had traveled during the past two years were asked which of 20 types of accommodations they had stayed in during the last two years of travel that were closely associated with various types of activities (e.g., skiing, camping, cooking). (Note: See page 375 for a list of these accommodation types).

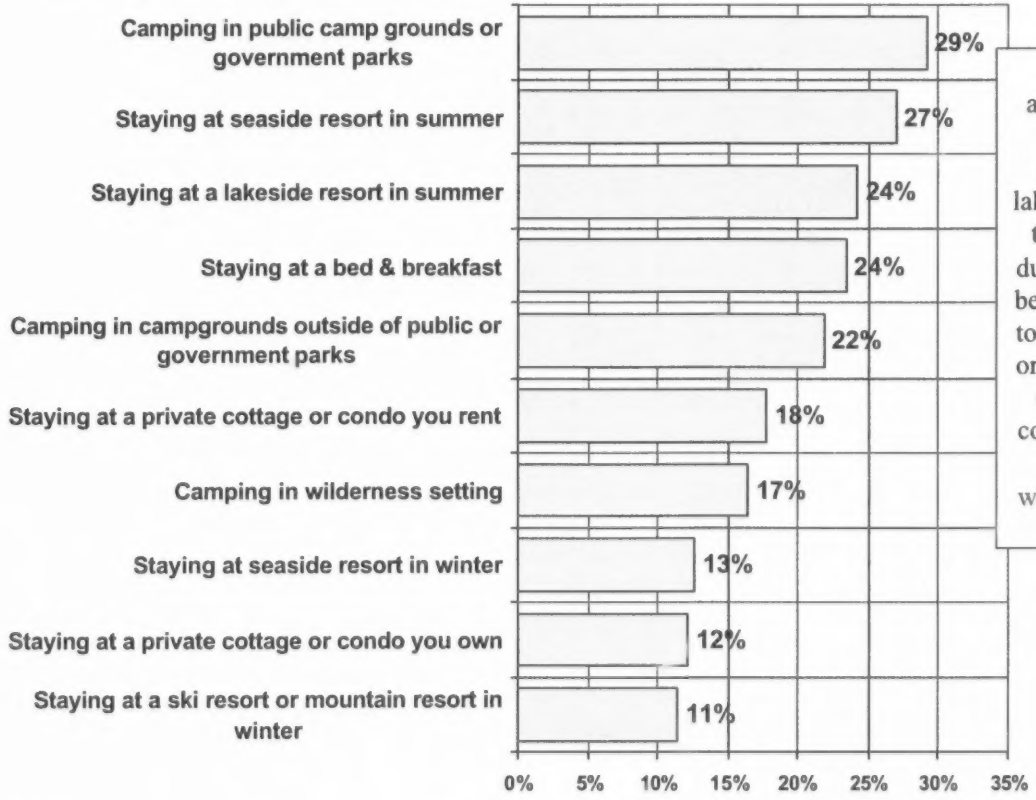
They were also asked which of these activity-related accommodation types they were likely to stay in over the course of the next two years.

The activity-related accommodation types stayed in during the last two years were factor analysed to identify general patterns in the types of activity-related accommodations utilized on trips.

The likelihood that various types of activity-related accommodations had been stayed in during the past two years was examined by country and market segment.

Activity-Related Accommodation Types Stayed In By 10 % or More of the Adult Travelers During Travel in the Past two years

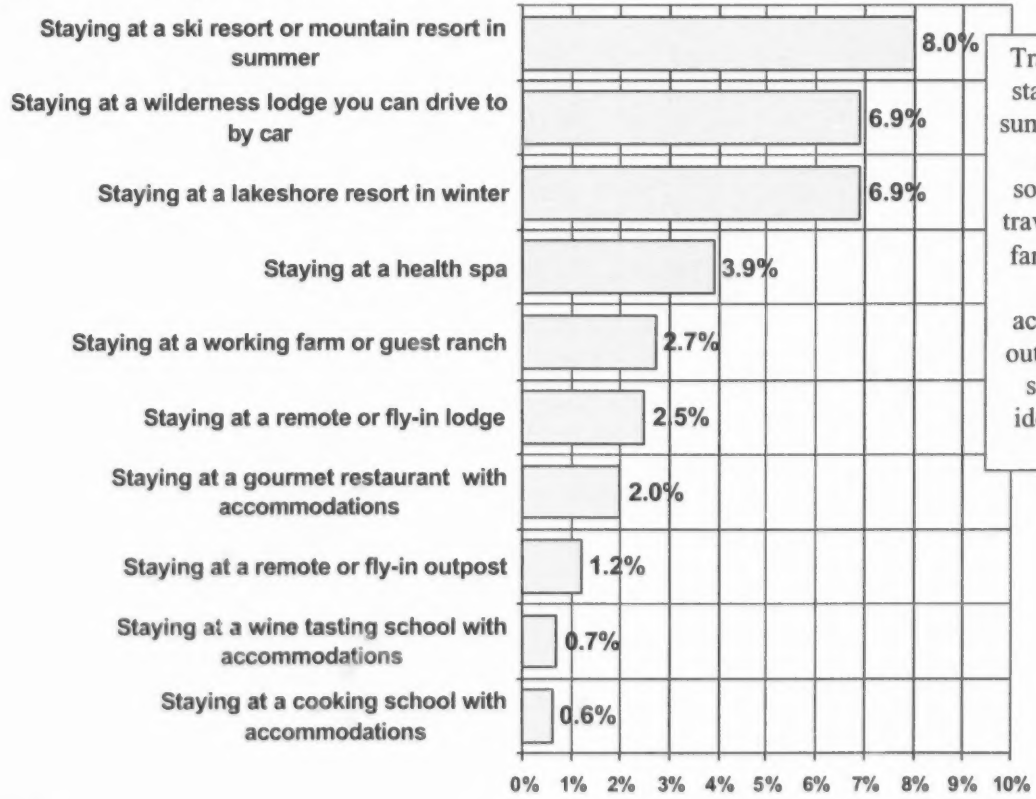
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Of the 20 types of activity-related accommodations examined, travelers were most likely to have stayed in public campgrounds within a park. Seaside and lakeside resorts during the summer were also types of accommodations frequently used during travel. Almost one in four stayed in a bed and breakfast. Travelers were also likely to have camped outside public campgrounds or in the wilderness, rented a private cottage or condo or stayed at a private cottage or condo, that they owned. Staying at a seaside resort or ski/mountain resort during the winter were also mentioned by at least 10 % of the travelers.

Activity-Related Accommodation Types Stayed In By Less Than 10 % of the Adult Population During Travel in the Past two years

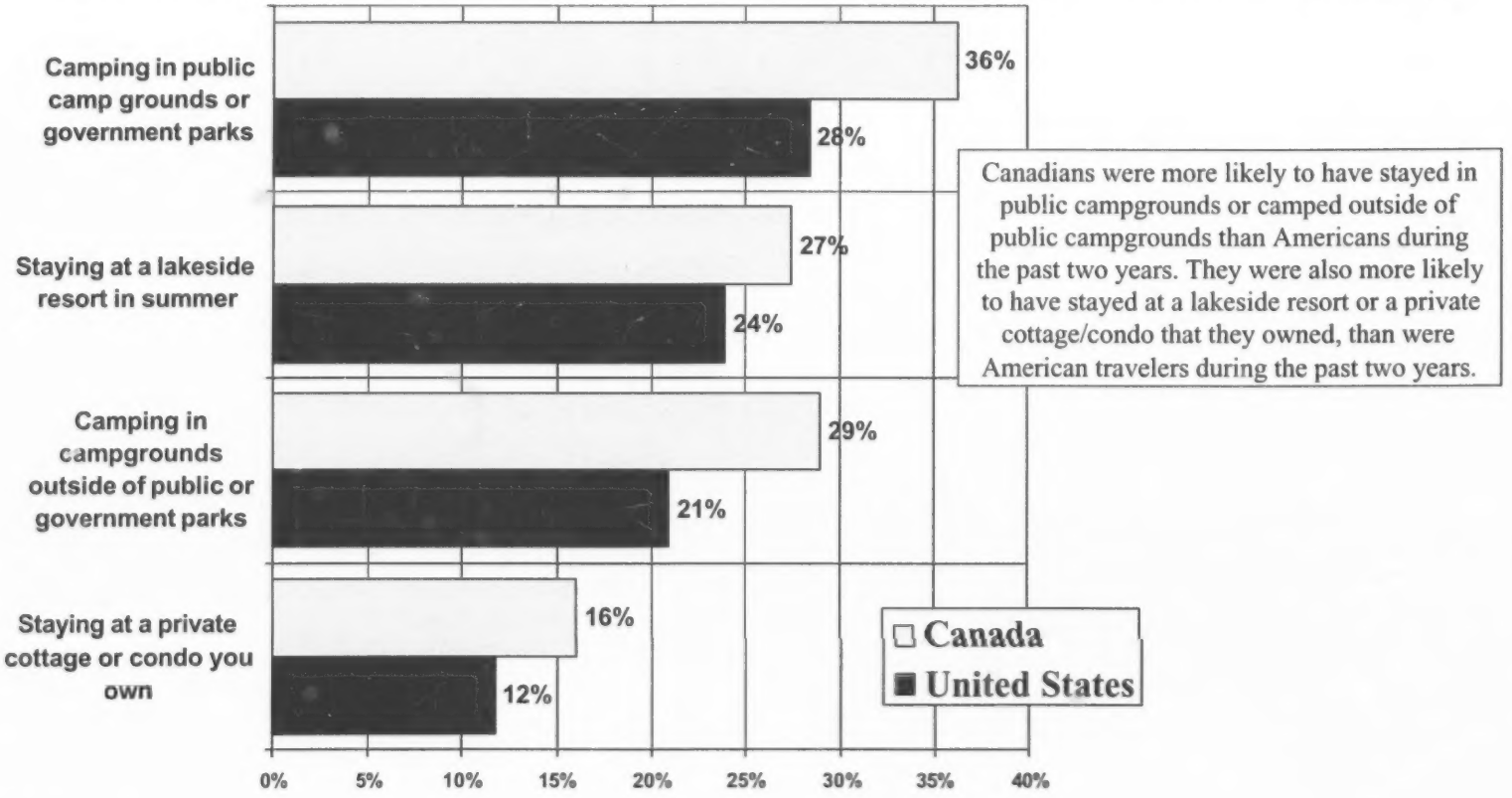
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Travelers were somewhat less likely to have stayed at a ski or mountain resort during the summer or a lakeside resort during the winter. Staying in a wilderness lodge was also somewhat uncommon. Less than 5 % of the travelers have stayed at a health spa, working farm or participatory ranch, or remote fly-in lodge, or a gourmet restaurant with accommodations. Staying at a remote fly-in outpost or going to a wine tasting or cooking school with accommodations were rarely identified accommodations used during the past two years.

Accommodation Types Canadians Were More Likely to Have Stayed In During Travel in the Past two years

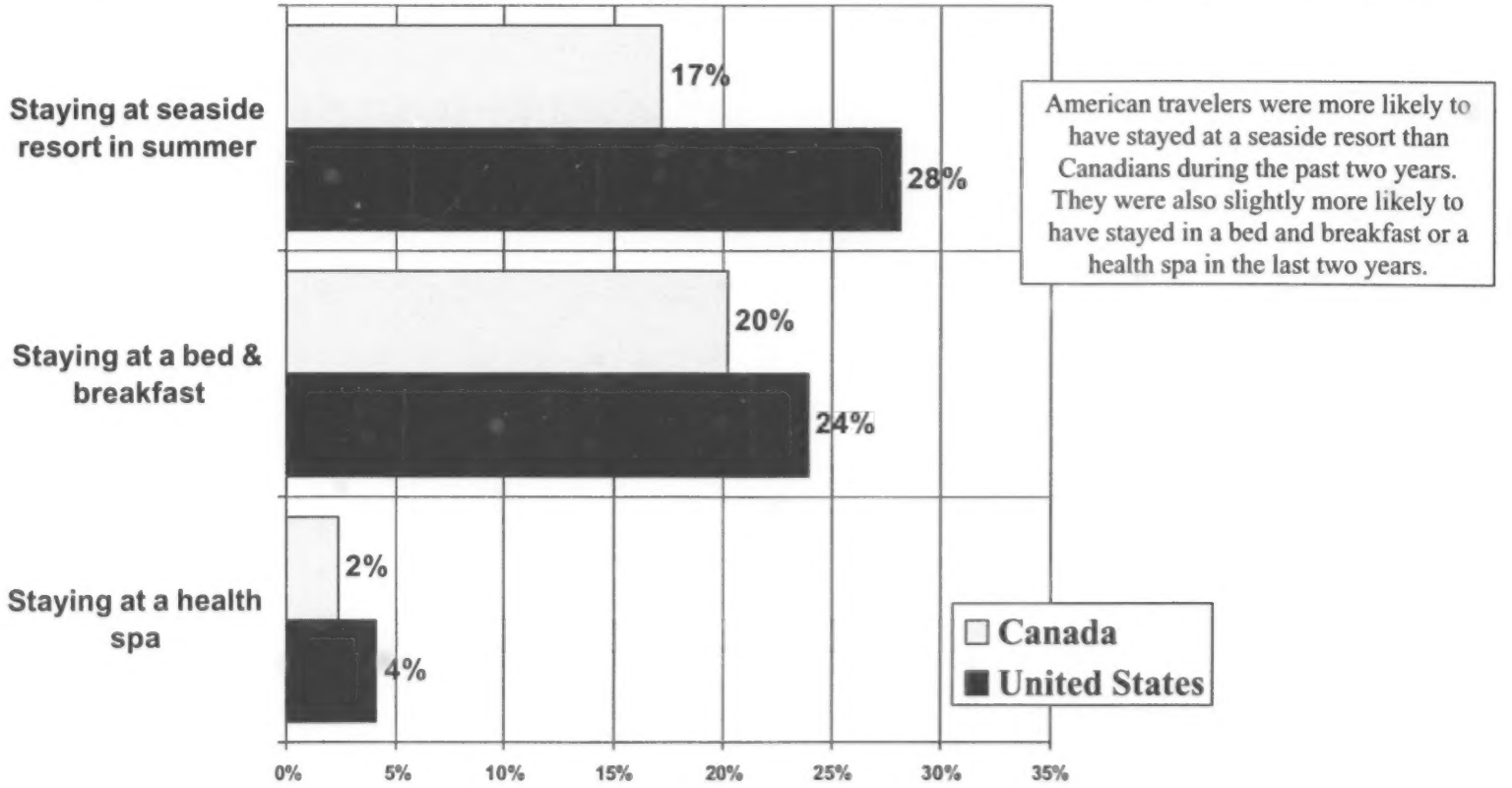
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada vs. U.S. (Mailback Survey)



Canadians were more likely to have stayed in public campgrounds or camped outside of public campgrounds than Americans during the past two years. They were also more likely to have stayed at a lakeside resort or a private cottage/condo that they owned, than were American travelers during the past two years.

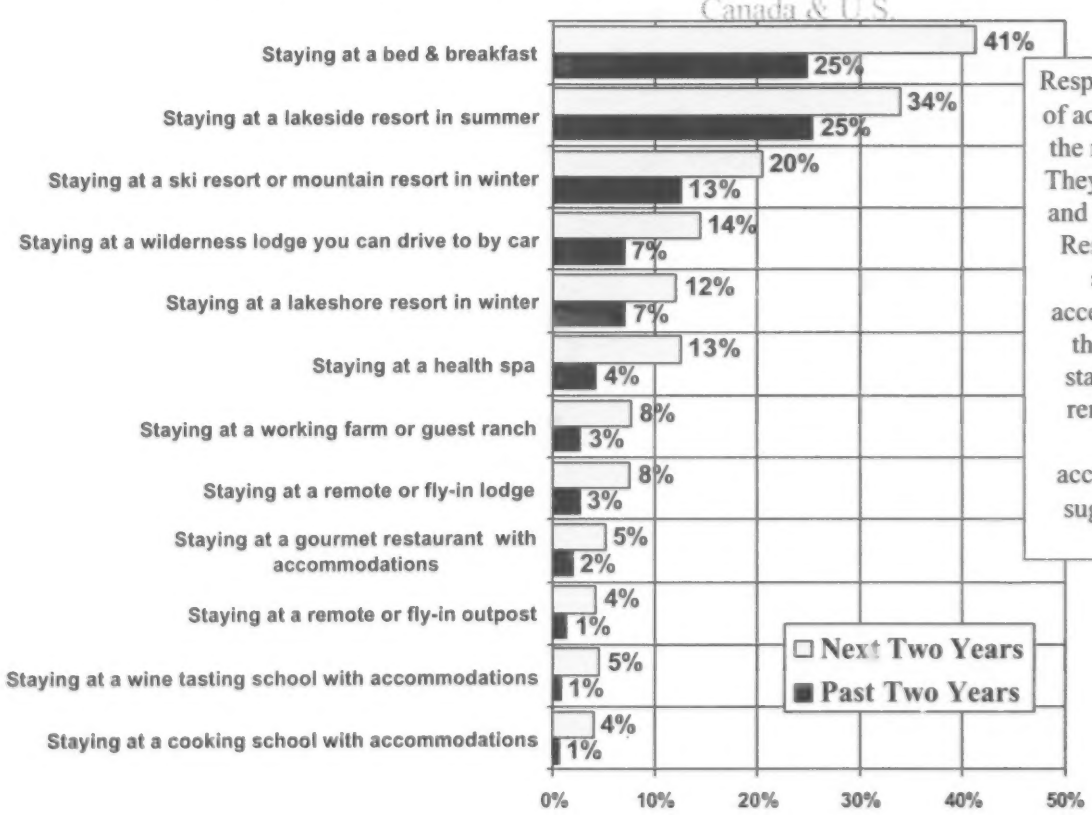
Accommodation Types Americans Were More Likely to Have Stayed In During Travel in the Past two years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada vs. U.S. (Mailback Survey)



Accommodation Types More Likely to Be Stayed In During Next Two Years Relative to the Past two years

Base: Total Population (18 Plus) Who Took a Trip/Plan Last Two Years to Take a Trip in the Next Two Years: Canada & U.S.



Respondents felt that they would use certain types of activity-related accommodations more often in the next two years relative to the past two years. They were especially more likely to stay in a bed and breakfast or a lakeside resort in the summer. Respondents felt they were also more likely to stay in ski resorts (in winter) and vehicle accessible wilderness lodges. Respondents were three times as likely to express an interest in staying in accommodations such a health spa, remote fly-in lodges, wine tasting or cooking schools and gourmet restaurants with accommodations, relative to the last two years, suggesting that more exotic forms of vacation travel may be on the increase.

Factor Analysis of Accommodation-Related Activities Participated In During Past Two Years of Travel

The types of accommodation-related activities participated in during the last two years were submitted to a factor analysis to identify general activity-related accommodation types. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories of activity-related accommodations. The factors may be used to generate factor scores which measure the degree to which general types of activity-related accommodations have been stayed in by each segment of the travel market. This analysis identified the following seven types of activity-related accommodations:

Camping

- Camping outside of public camp grounds, Camping in public camp grounds, Camping in wilderness settings

Cooking & Wine Tasting Schools

- Staying at cooking school, Staying at wine tasting schools

Lakeside or Wilderness Lodges (Vehicle Accessible)

- Vehicle accessible wilderness lodge, Lakeside resort in summer, Lakeside resort in winter

Remote Fly-in Lodges or Outposts

- Staying at remote fly-in outpost, Staying at remote fly-in lodge

Ski Resorts

- Staying ski resort in summer, Staying at ski resort in winter

Seaside Resorts

- Staying at seaside resort in winter, Staying at seaside resort in summer

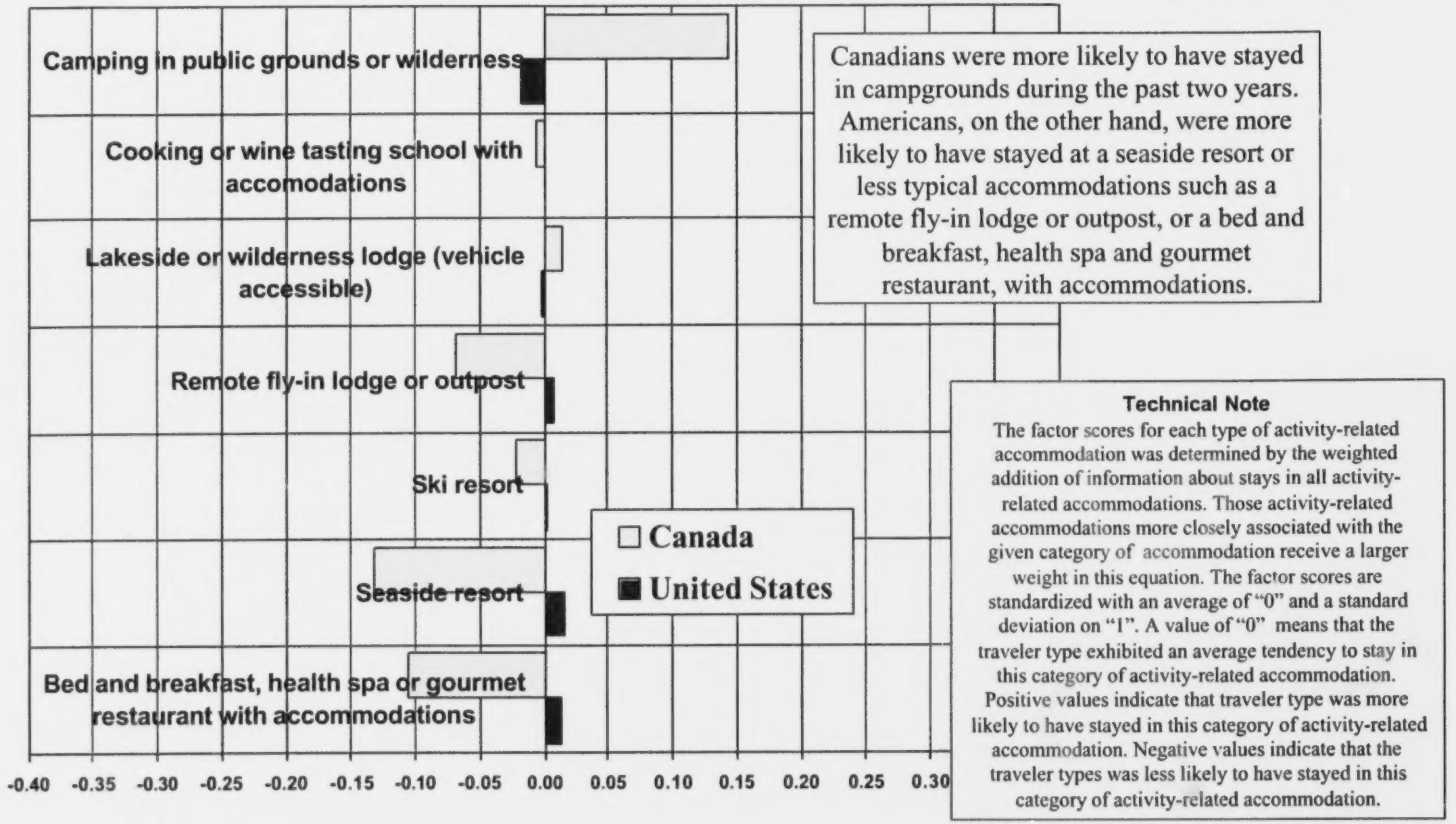
Bed & Breakfast, Health Spas & Gourmet Restaurants With Accommodations

- Staying at bed and breakfast, Staying at health spa, Staying at gourmet restaurants

Types of Accommodations Stayed In During Past Two Years

Canada versus United States

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada vs. U.S. (Mailback Survey)



Canadians were more likely to have stayed in campgrounds during the past two years. Americans, on the other hand, were more likely to have stayed at a seaside resort or less typical accommodations such as a remote fly-in lodge or outpost, or a bed and breakfast, health spa and gourmet restaurant, with accommodations.

Technical Note

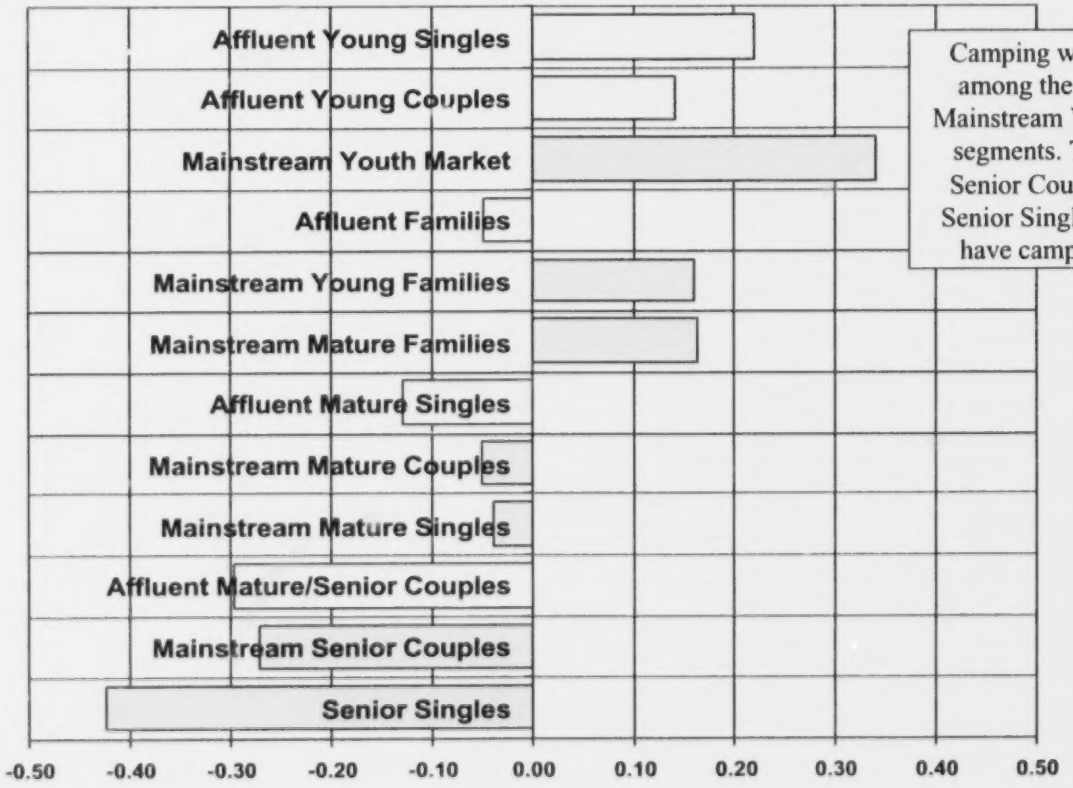
The factor scores for each type of activity-related accommodation was determined by the weighted addition of information about stays in all activity-related accommodations. Those activity-related accommodations more closely associated with the given category of accommodation receive a larger weight in this equation. The factor scores are standardized with an average of "0" and a standard deviation on "1". A value of "0" means that the traveler type exhibited an average tendency to stay in this category of activity-related accommodation. Positive values indicate that traveler type was more likely to have stayed in this category of activity-related accommodation. Negative values indicate that the traveler types was less likely to have stayed in this category of activity-related accommodation.

Type of Accommodations Stayed In During Past Two Years

Camping

Camping in Public Grounds, Camping Outside of Public Grounds, Camping in Wilderness

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



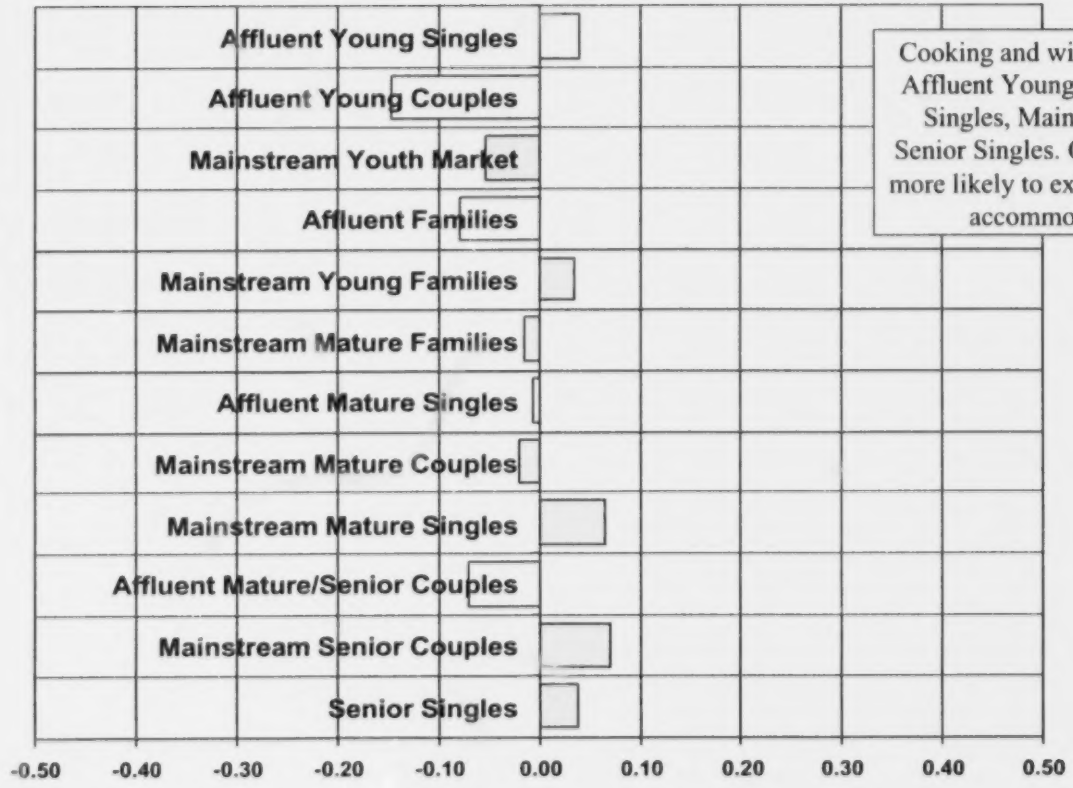
Camping was clearly more common among the youth segments and the Mainstream Young and Mature Family segments. The Affluent Mature and Senior Couples, Senior Couples and Senior Singles were the least likely to have camped in the last two years.

Type of Accommodations Stayed In During Past Two Years

Cooking & Wine Schools

Staying at cooking schools, Staying at wine tasting schools

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



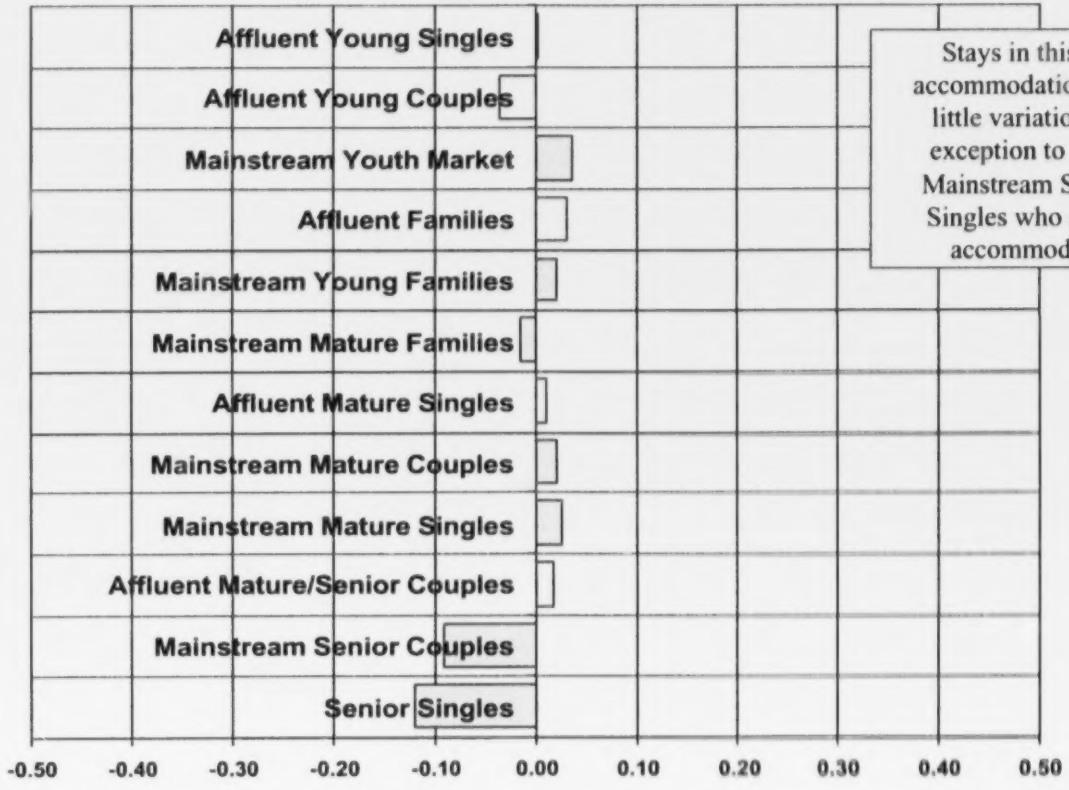
Cooking and wine schools appeal most to the Affluent Young Singles, Mainstream Mature Singles, Mainstream Senior Couples and Senior Singles. Clearly, singles who travel are more likely to exhibit an interest in this type of accommodation-related activity.

Type of Accommodations Stayed In During Past Two Years

Lakeside & Wilderness Lodges

Vehicle accessible wilderness lodge, Lakeside resort in summer, Lakeside resort in winter

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



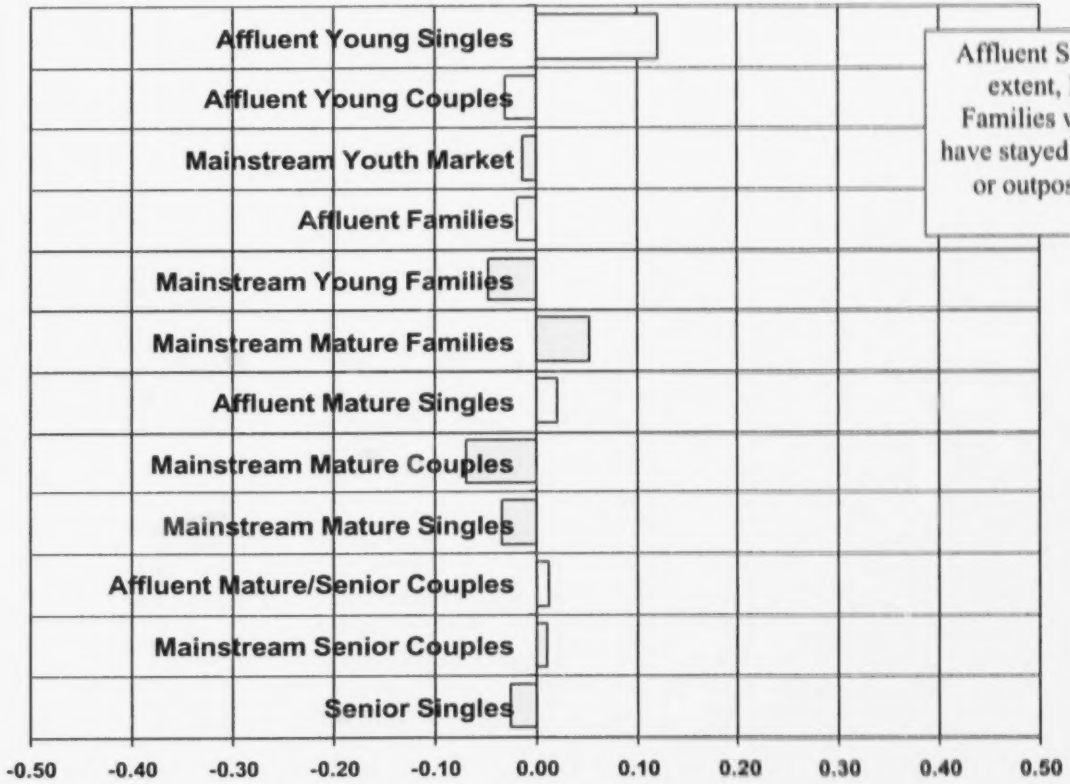
Stays in this type of activity-related accommodation exhibited comparatively little variation across the market. The exception to this trend is observed for Mainstream Senior Couples and Senior Singles who show less interest in such accommodation-related activities.

Type of Accommodations Stayed In During Past Two Years

Remote Fly-in Lodges or Outposts

Staying in remote fly-in outpost, Staying at remote fly-in lodge

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



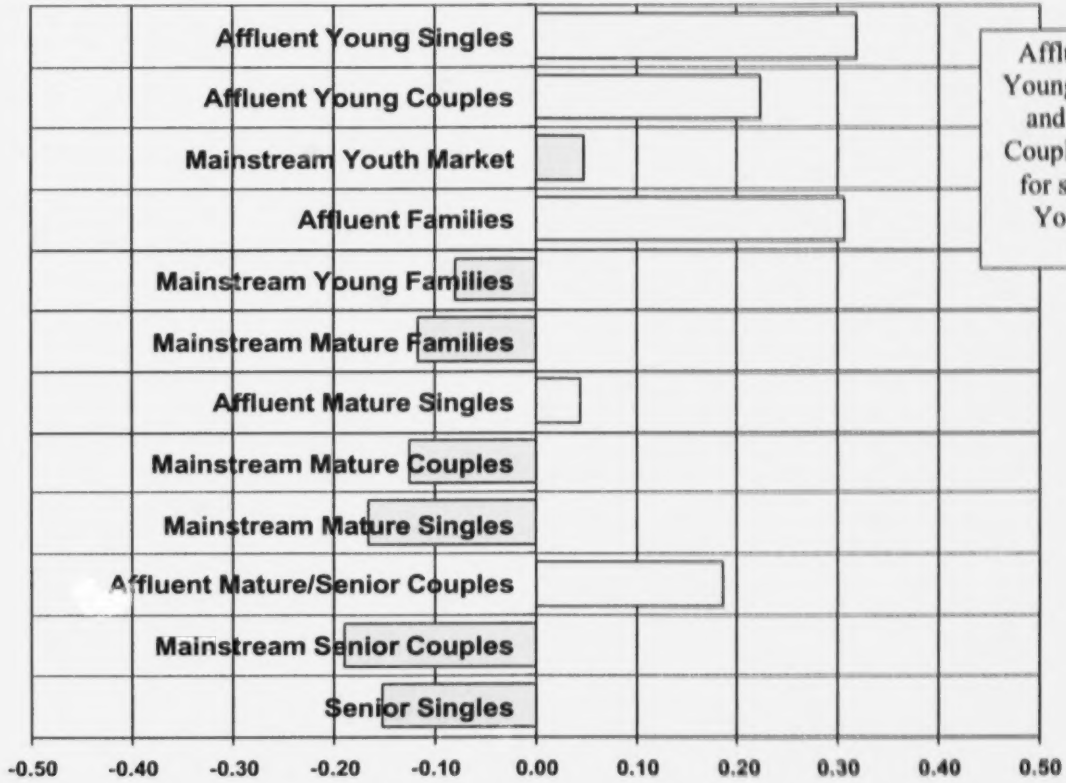
Affluent Singles, and to a certain extent, Mainstream Mature Families were the most likely to have stayed in a remote fly-in lodge or outpost during the past two years.

Type of Accommodations Staying In During Past Two Years

Ski Resorts

Staying at ski resorts in summer, Stay at ski resort in winter

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years; Canada & U.S. (Mailback Survey)



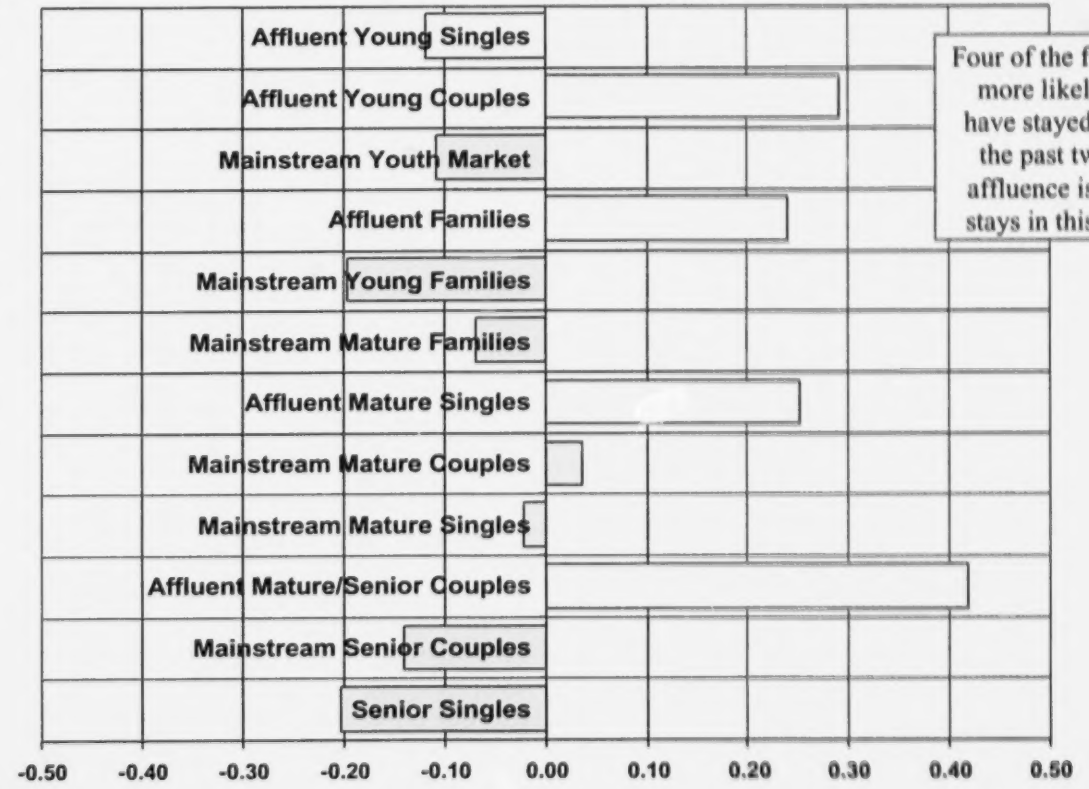
Affluent Young Singles, Affluent Young Couples, Affluent Families and Affluent Mature & Senior Couples are clearly prime markets for ski resorts. The Mainstream Youth Market is a secondary market for ski resorts.

Type of Accommodations Stayed In During Past Two Years

Seaside Resorts

Staying at seaside resort in winter, Staying at seaside resort in summer

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



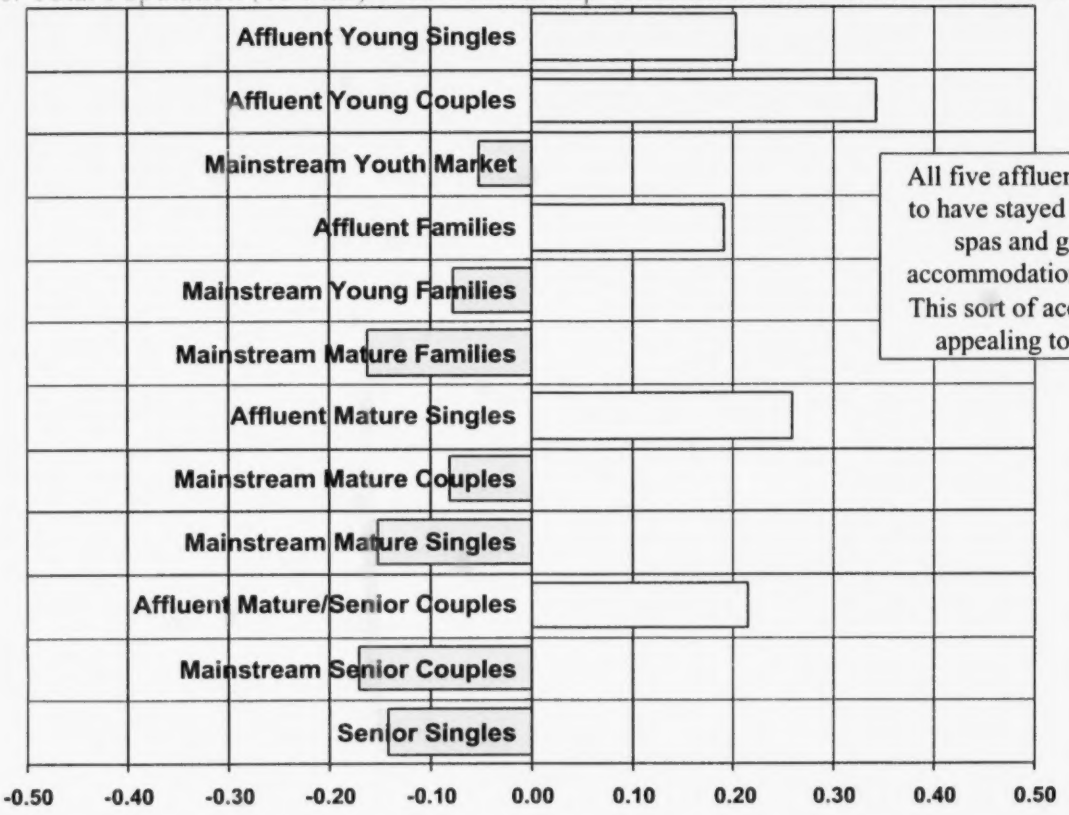
Four of the five affluent segments were more likely than other segments to have stayed at a seaside resort during the past two years, suggesting that affluence is strongly associated with stays in this type of accommodation.

Type of Accommodations Stayed In During Past Two Years

Bed & Breakfast, Health Spas, Gourmet Restaurants

Staying at bed & breakfast, health spa, gourmet restaurant with accommodations

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



All five affluent segments were more likely to have stayed in bed and breakfasts, health spas and gourmet restaurants (with accommodations) during the last two years. This sort of accommodation was especially appealing to Affluent Young Couples.

Section Fifteen

Touring & Cruising

Touring & Cruising Sought & Will Seek

- Key Findings -

The most common type of touring activity was that taken using a personal vehicle (e.g., wandering around small towns and villages, coastal or lakeshore drives). Affluent Young Couples and Affluent Mature and Senior Couples were the most likely to have taken a tour of this type, suggesting they are prime markets for touring travel using a personal vehicle. The higher incidence of touring using a personal vehicle reflects the appeal of exploratory and spontaneous travel activity for these two segments. Affluent Families, Affluent Mature Singles and Mainstream Mature Couples represent secondary markets for travel of this type.

The most common public tours taken include guided bus and boat tours of cities and the countryside, tours of wineries, and ocean cruises. Mainstream Senior Couples and Senior Singles were especially likely to have taken a guided bus tour during the last two years, and these segments are clearly prime markets for this sort of touring activity.

Wine tours were most often taken by Affluent Young Couples, Affluent Mature Singles and Affluent Mature and Senior Couples, and these markets can be expected to be the most responsive to tour promotions of this type.

Relative to the past two years, respondents expressed considerable interest in ocean cruises, wine tours and scenic day tours by train. There was also considerable interest in Great Lakes cruises. This outcome is consistent with the assessment of the appeal of Great Lakes cruising in the assessment of new tourism products in Section 21 of this report. Great Lakes cruising was particularly appealing to Affluent Young Singles, Affluent Mature Singles and Mainstream Mature Singles. As such, this unique vacation experience may be well suited for singles who travel frequently and exhibit an interest in exploration, novelty and opportunities to socialize with others.

Touring & Cruising Sought & Will Seek

- Research Method -

In the mailback survey, those who had traveled during the past two years were asked which of 13 types of overnight and day tours and cruises they had taken. (Note: See page 390 for a list of the tour types).

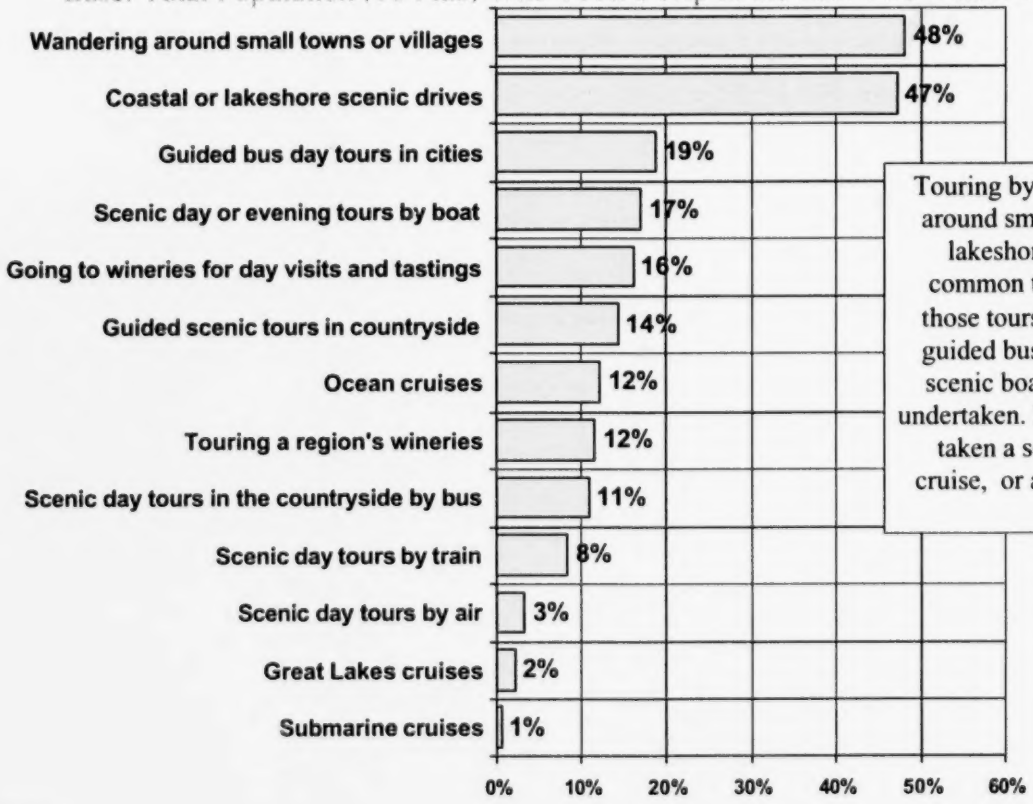
They were also asked which of these types of day or overnight tours and cruises they would be likely to take over the course of the next two years.

The tours and cruises taken during the last two years were factor analyszed to identify general patterns in the types of tours and cruises taken.

The likelihood that various types of tours and cruises had been taken during the past two years was examined by country and market segment.

Percent Taking Various Overnight and Day Tours and Cruises During the Past two years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

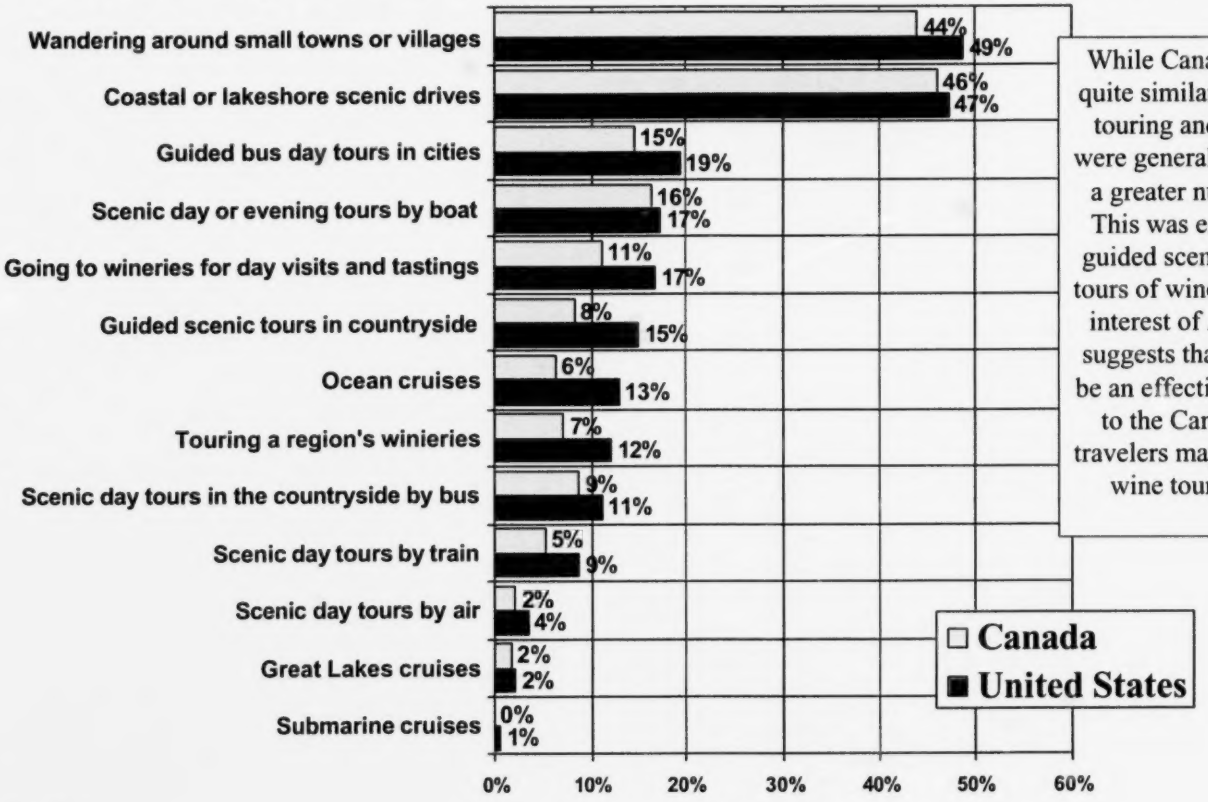


Touring by personal vehicle (i.e., wandering around small towns and villages, coastal or lakeshore drives) was clearly the most common type of touring activity. Among those tours involving public transportation, guided bus tours, day tours of wineries and scenic boat tours were the most frequently undertaken. Respondents were unlikely to have taken a scenic tour by air, a Great Lakes cruise, or a submarine cruise during the last two years.

Percent Taking Various Overnight and Day Tours and Cruises During the Past two years

Canada versus the United States

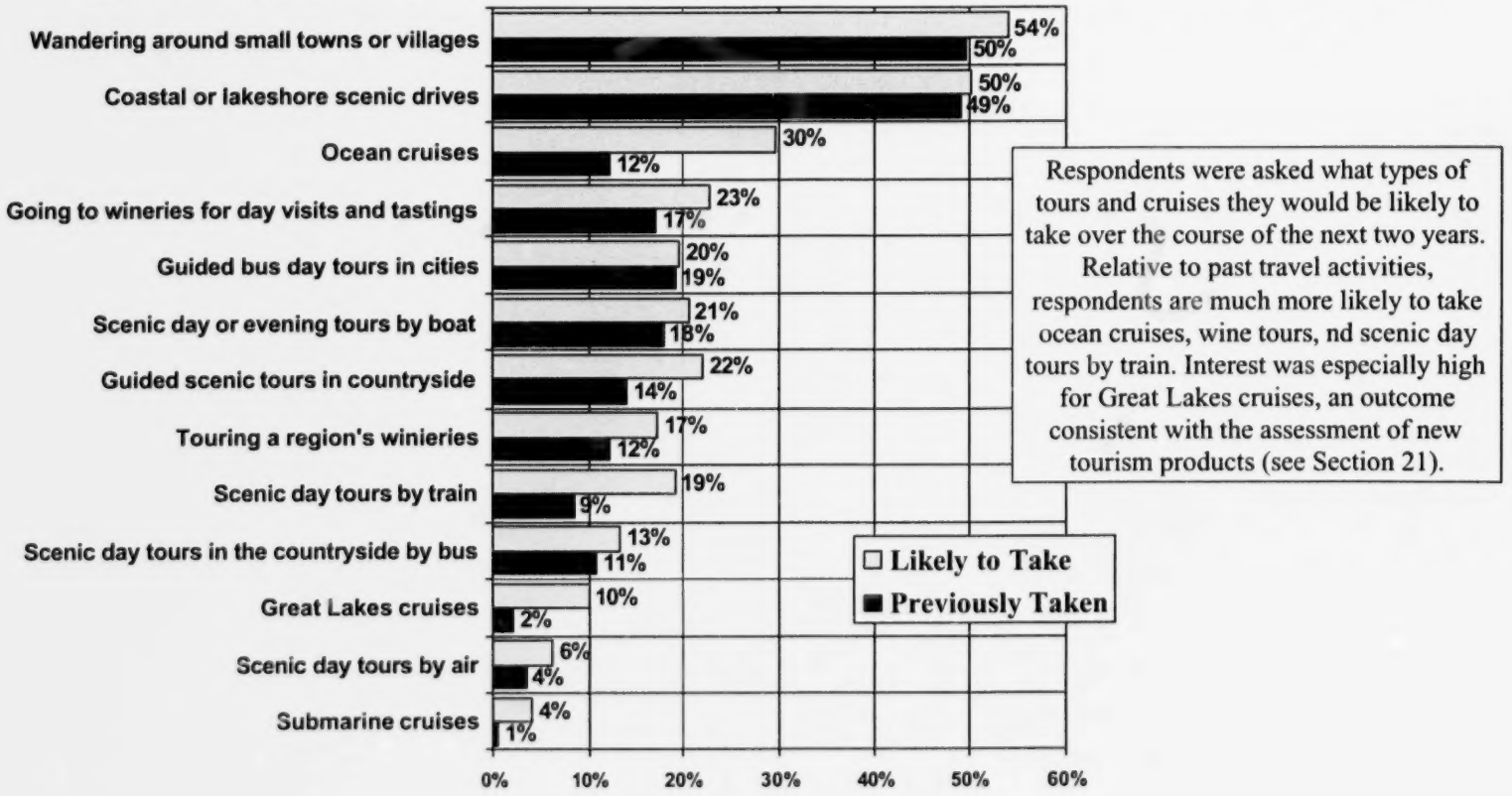
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada vs. U.S. (Mailback Survey)



While Canadians and Americans were quite similar in terms of the the types of touring and cruises taken, Americans were generally more likely to have taken a greater number of tours and cruises. This was especially true for overnight guided scenic tours of the country side, tours of wineries, and ocean cruises. The interest of Americans in ocean cruises suggests that Great Lakes cruising may be an effective way to attract Americans to the Canadian market. Americans travelers may also be more responsive to wine tour packages than Canadian travelers.

Percent Likely to Take Overnight/Day Tours/Cruises During The Next Two Years Relative to the Past Two Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Respondents were asked what types of tours and cruises they would be likely to take over the course of the next two years. Relative to past travel activities, respondents are much more likely to take ocean cruises, wine tours, nd scenic day tours by train. Interest was especially high for Great Lakes cruises, an outcome consistent with the assessment of new tourism products (see Section 21).

Factor Analysis of Tours & Cruises Taken During Past Two Years of Pleasure Travel

The types of tours and cruises taken during the last two years were submitted to a factor analysis to identify general tour/cruise types. Factor analysis is a statistical technique which uses the association between responses to individual items to construct more general (or abstract) categories of touring activities. The factors may be used to generate factor scores, which measure the degree to which each category of tours had been taken by various types of travelers. This analysis identifies the following seven types of tours and cruises:

Tours By Personal Vehicles

- Coastal or lakeshore scenic drives by day, Wandering around small villages & towns - overnight

Guided Bus Tours

- Scenic day tours in countryside by bus, Guided bus day tours in cities, Guided scenic tours of countryside involving an overnight stay

Wine Tours

- Going to wineries for day visits, Touring a region's wineries involving an overnight stay

Specialty Cruises

- Great Lake cruises by boat involving an overnight stay, Submarine cruises involving an overnight stay

Scenic Tours By Boat or Train

- Scenic day or evening tour by boat, Scenic day tours by train

Scenic Day Tour By Air

- Scenic day tour by air

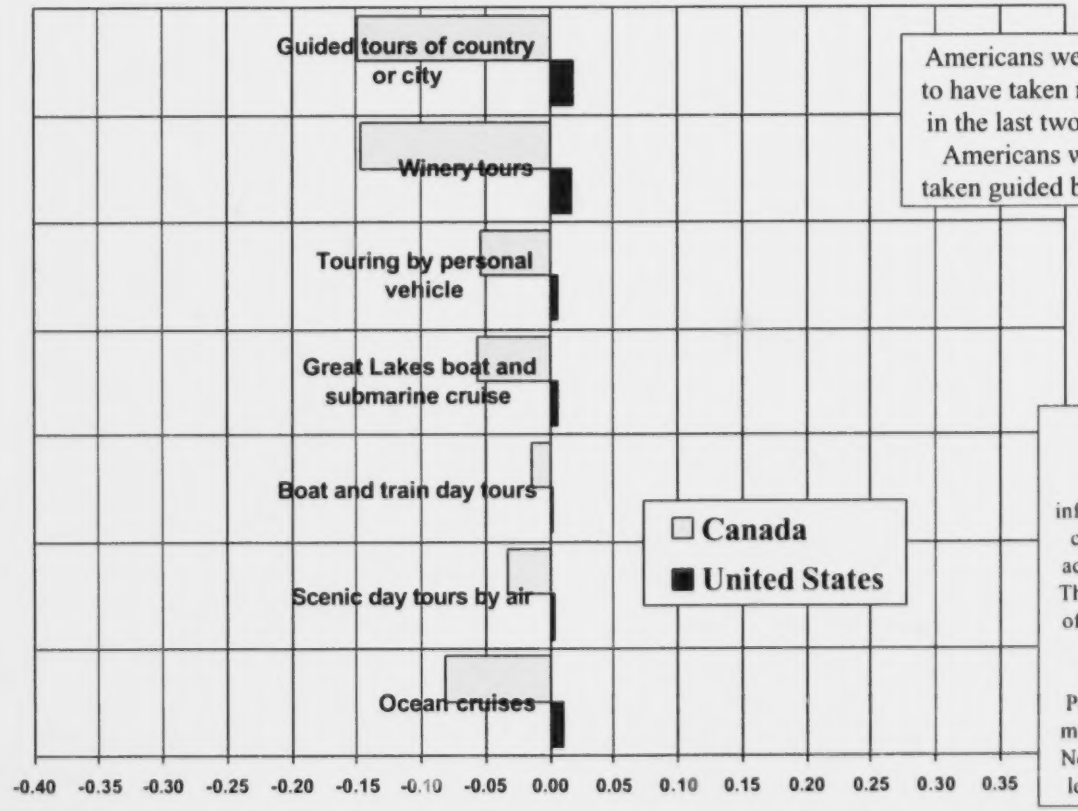
Ocean Cruises

- Ocean cruises

Types of Tours and Cruises Taken During Past Two Years

Canada versus United States

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada vs. U.S. (Mailback Survey)



Americans were more likely than Canadians to have taken most types of tours and cruises in the last two years. Relative to Canadians, Americans were especially likely to have taken guided bus tours and tours of wineries.

Technical Note

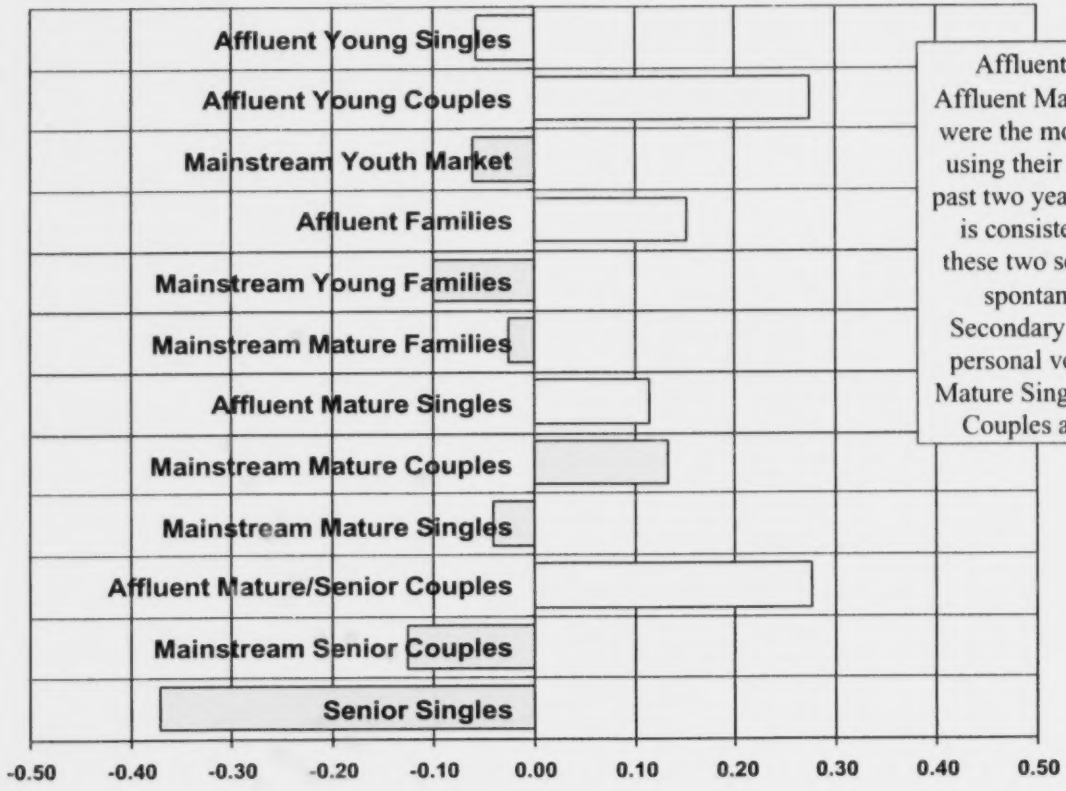
The factor scores for each type of tour is determined by the weighted addition of information about all tours taken. Those tours more closely associated with the given type of touring activity receive a larger weight in this calculation. The factor scores are standardized with an average of "0" and a standard deviation on "1". A value of "0" means that the traveler type exhibited an average tendency to take a given tour type. Positive values indicate that the traveler type was more likely to have taken a particular type of tour. Negative values indicate that the traveler type was less likely to have taken a particular type of tour.

Type of Tours & Cruises Taken During Past Two Years

Tours By Personal Vehicle

Coastal or lakeshore scenic drives by day, Wandering around villages and small towns

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



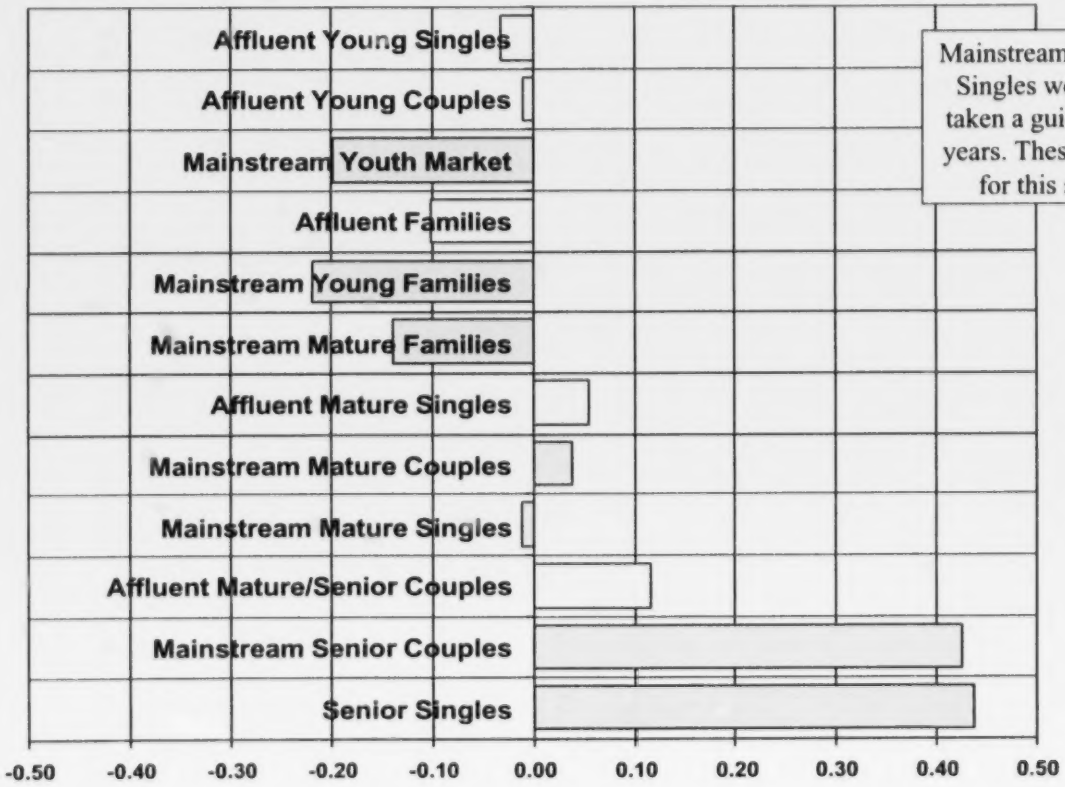
Affluent Young Couples and Affluent Mature and Senior Couples were the most likely to have toured using their own vehicle during the past two years. This vacation pattern is consistent with the interest of these two segments in exploratory, spontaneous travel activity. Secondary markets for touring by personal vehicle include Affluent Mature Singles, Mainstream Mature Couples and Affluent Families.

Type of Tours & Cruises Taken During Past Two Years

Guided Bus Tours

Scenic Bus Tours in Countryside (Overnight & Day Tours), Guided Bus Tours of Cities

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



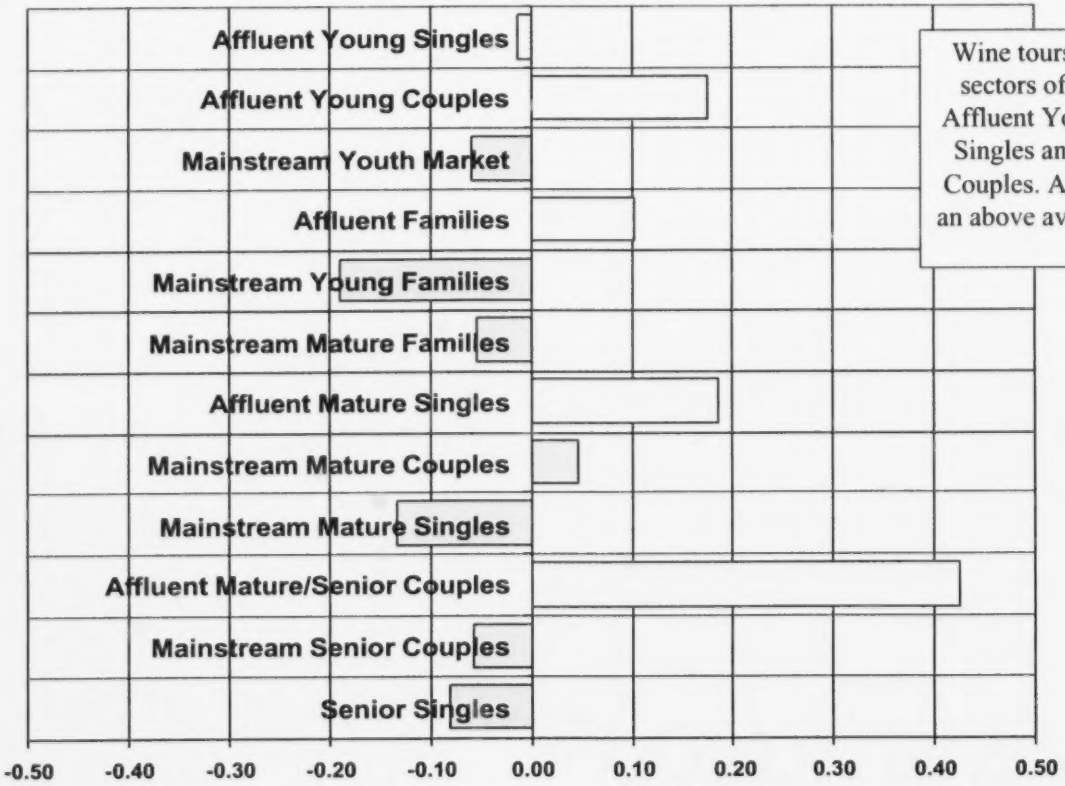
Mainstream Senior Couples and Senior Singles were the most likely to have taken a guided bus tour in the last two years. These are clearly prime markets for this sort of vacation activity.

Type of Tours & Cruises Taken During Past Two Years

Wine Tours

Going to Wineries for Day Tour, Touring Region's Wineries Involving Overnight Stay

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



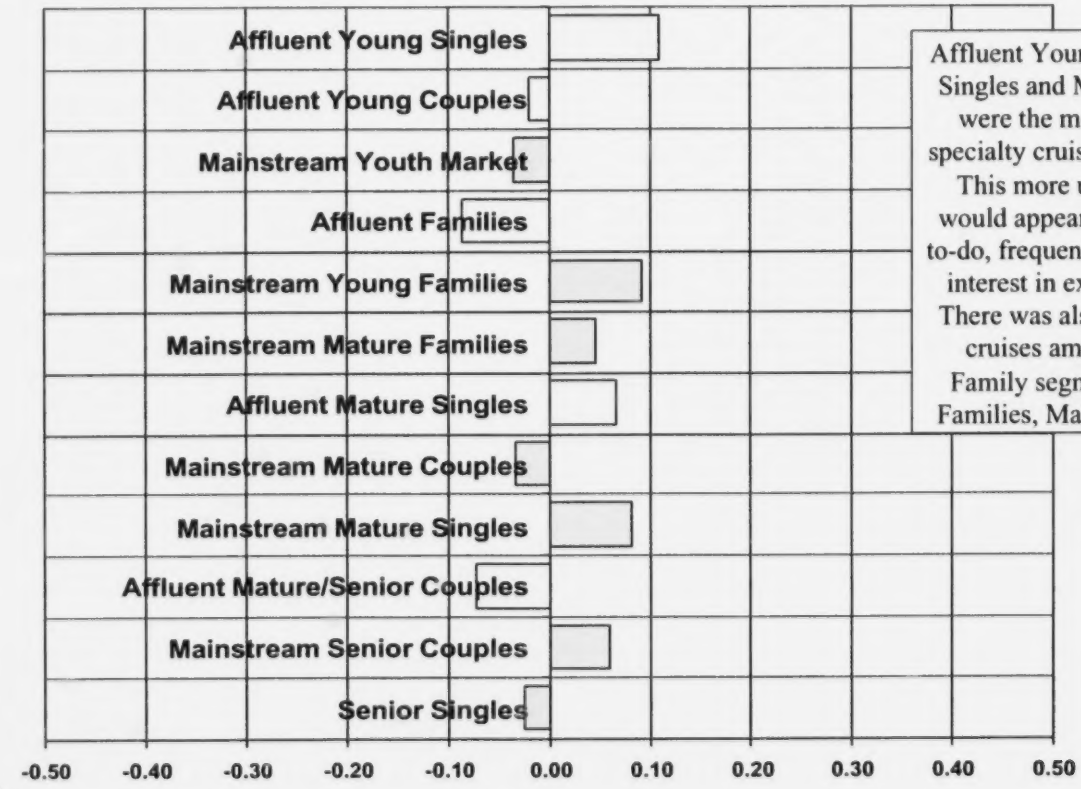
Wine tours appeal mostly to the affluent sectors of the market, and in particular Affluent Young Couples, Affluent Mature Singles and Affluent Mature and Senior Couples. Affluent Families also exhibited an above average participation rate in wine tours.

Type of Tours & Cruises Taken During Past Two Years

Specialty Cruises

Overnight Great Lakes Cruises By Boat, Overnight Submarine Cruises

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



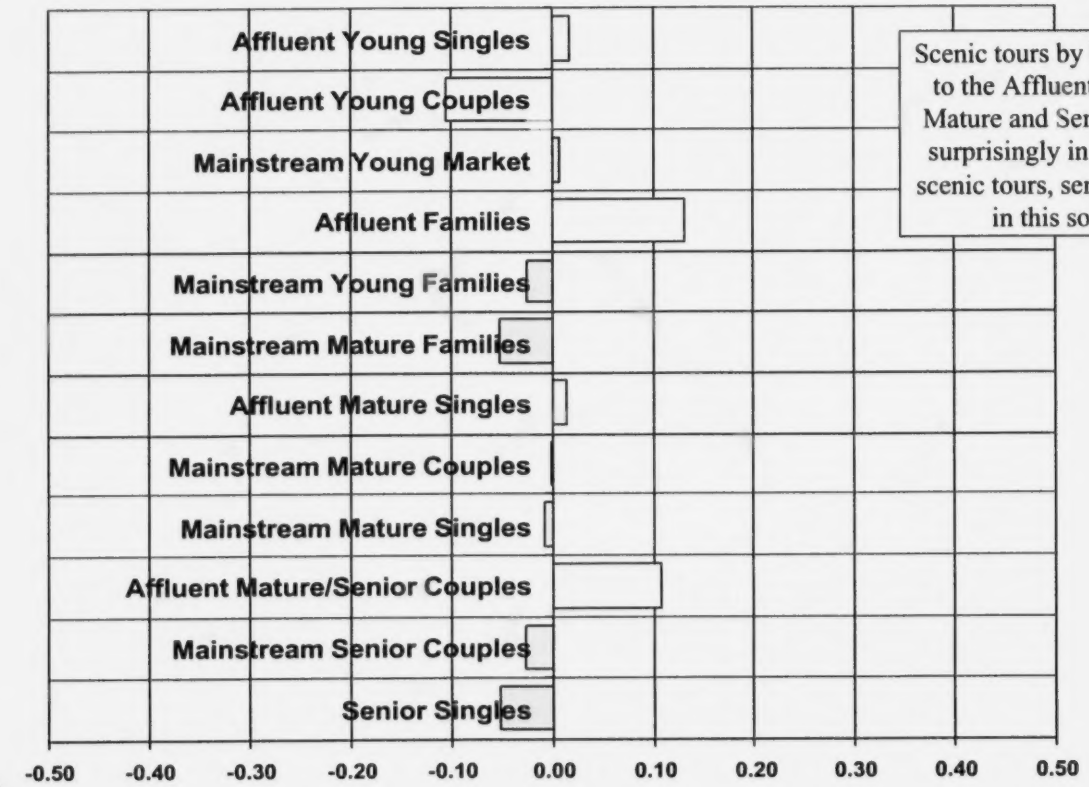
Affluent Young Singles, Affluent Mature Singles and Mainstream Mature Singles were the most likely to have taken a specialty cruise during the past two years. This more unusual travel experience would appear to be well suited for well-to-do, frequently traveling singles with an interest in exploration and socializing. There was also interest in these types of cruises among the two Mainstream Family segments (Mainstream Young Families, Mainstream Mature Families).

Type of Tours & Cruises Taken During Past Two Years

Scenic Tours By Boat or Train

Scenic Day or Evening Tours By Boat, Scenic Tours By Train

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



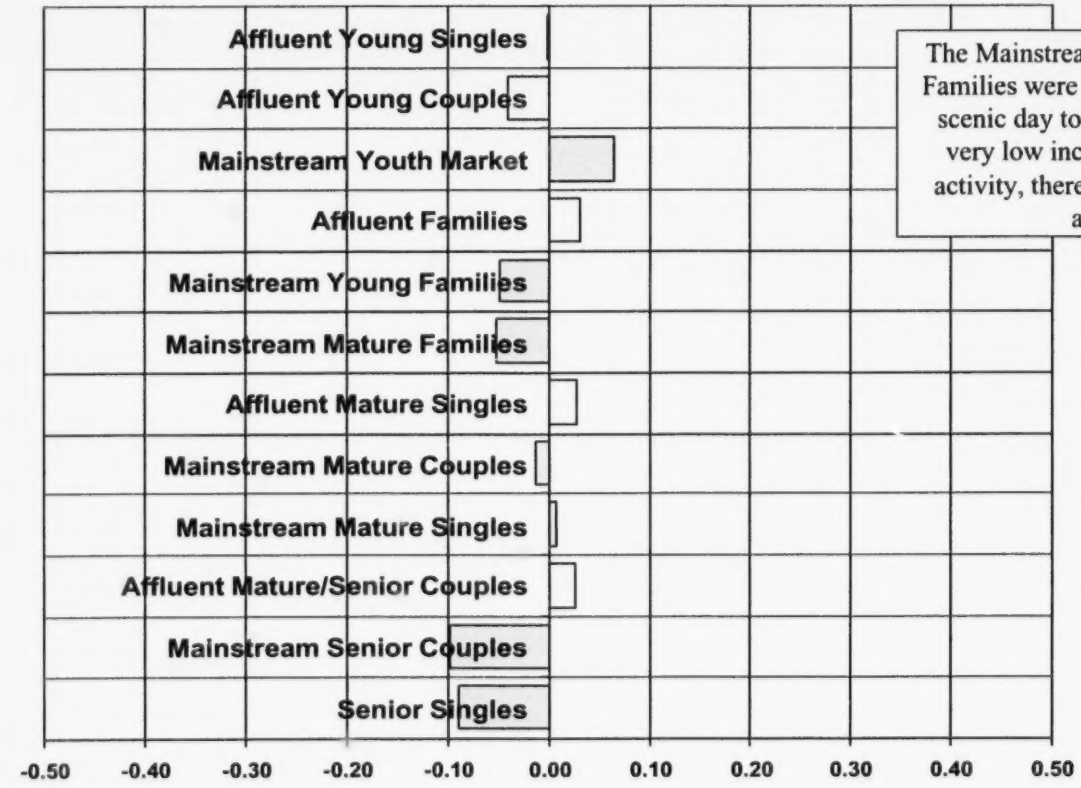
Scenic tours by boat or train appeal most to the Affluent Families and Affluent Mature and Senior Couples. Somewhat surprisingly in view of their interest in scenic tours, seniors were less interested in this sort of tour activity.

Type of Tours & Cruises Taken During Past Two Years

Scenic Day Tours By Air

Scenic Day Tours By Air

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



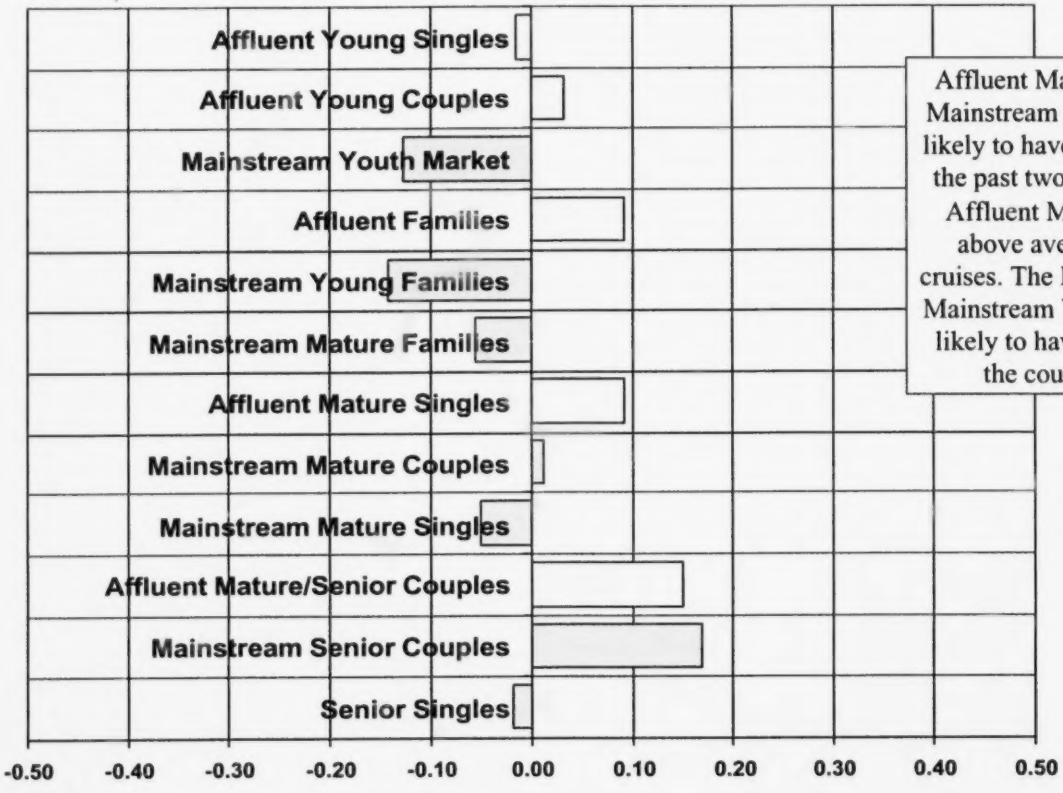
The Mainstream Youth Market and Affluent Families were the most likely to have taken a scenic day tour by air. However, given the very low incidence of this sort of touring activity, there was relatively little variation across the market.

Type of Tours & Cruises Taken During Past Two Years

Ocean Cruises

Ocean Cruises

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Affluent Mature and Senior Couples and Mainstream Senior Couples were the most likely to have taken an ocean cruise during the past two years. Affluent Families and Affluent Mature Singles also exhibited above average participation in ocean cruises. The Mainstream Youth Market and Mainstream Young Families were the least likely to have taken an ocean cruise over the course of the past two years.

Section Sixteen

Business Travel

Business Travel

- Key Findings -

The most common types of business travel in the past two years were trips to attend business meetings and trips to attend conferences and seminars. Attending company paid training, business conventions and trade shows were also common reasons for business travel. Four percent of the North American travelers reported receiving a paid vacation from their employer (incentive travel) during the past two years.

Americans were considerably more likely to have taken overnight business trips to other cities. This is especially evident for travel to attend a conference or seminar and going to another city to receive training.

The incidence of business travel increased sharply with increases in the education level and household income. In terms of the 12 market segments, the incidence of business travel was highest among Affluent Young Couples, Affluent Families, Affluent Mature Singles and Affluent Mature and Senior Couples. These are prime markets for promotional activities linked to business travel.

Business Travel

- Research Method -

In the mailback survey, those who had traveled during the past two years were asked which of six types of business travel they had done during the last two years:

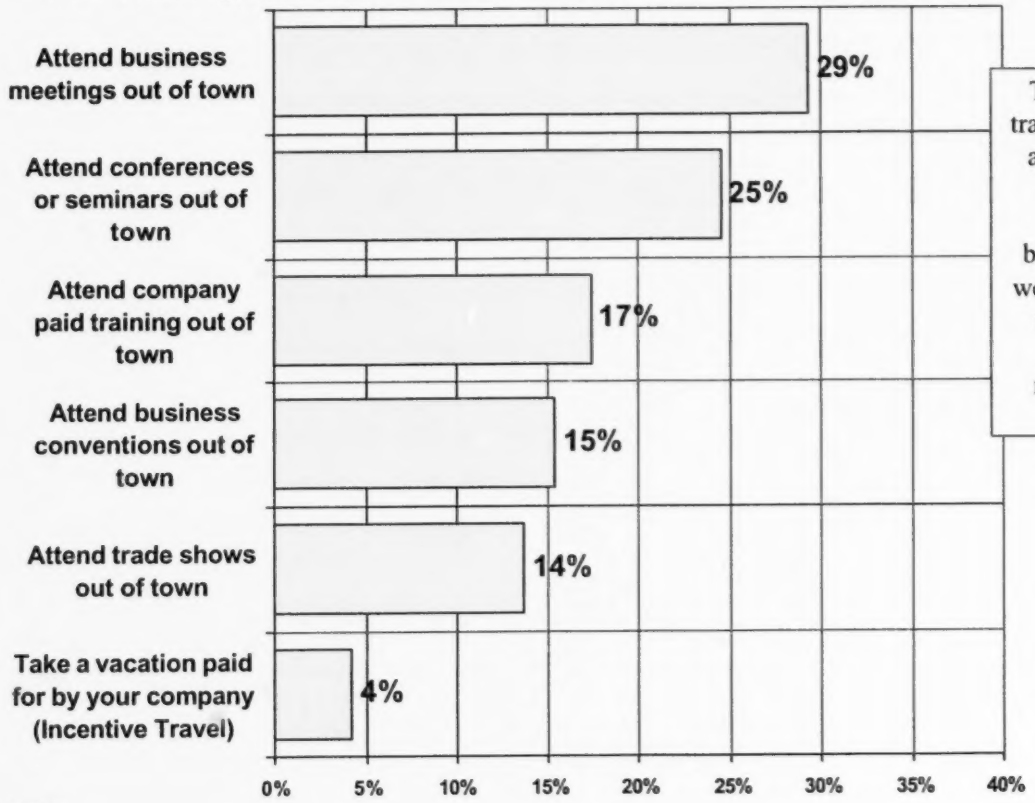
- Attended business meetings
- Attended trade shows out of town
- Attended business conventions out of town
- Attended conferences or seminars out of town
- Attended company paid training out of town
- Taken a vacation paid for by your company (Incentive Travel)

They were also asked which of these same types of business travel they were likely to do over the course of the next two years.

The likelihood that business travel had been taken during the past two years was examined by country, demographic characteristics and market segment.

Percent of Adult Travelers (18 Plus) Taking Various Types of Out-of-Town Business Trips During the Past two years

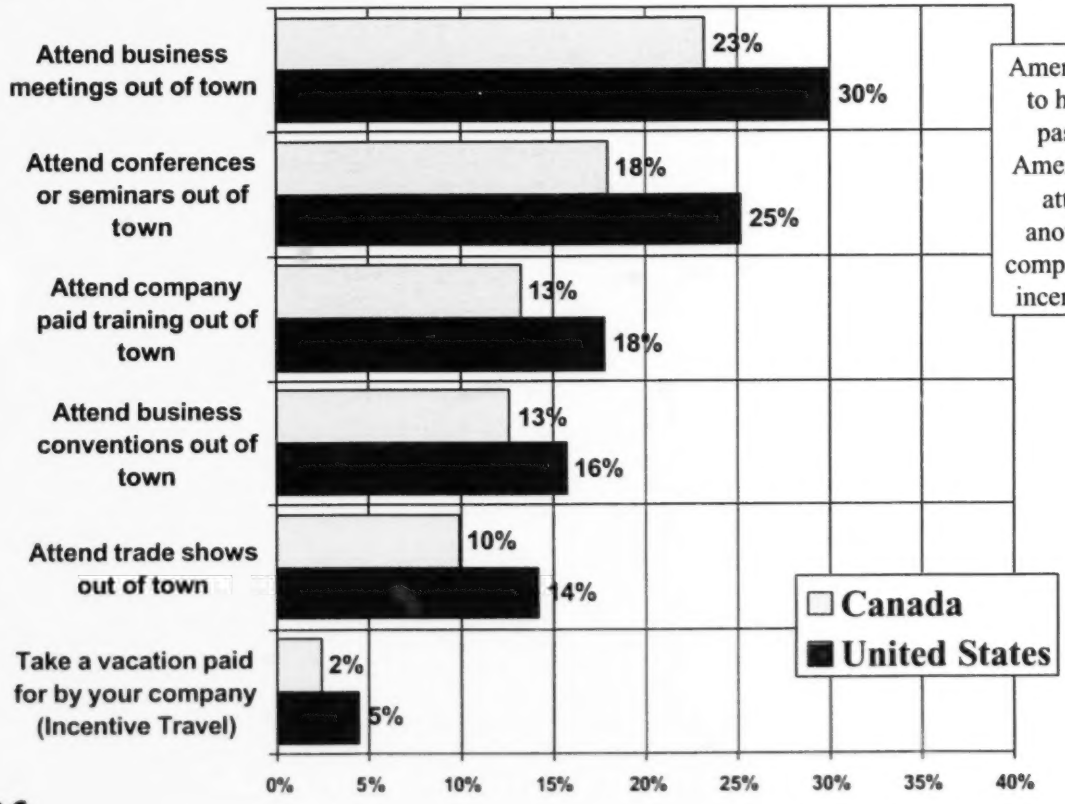
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



The most common types of business travel in the past two years were trips to attend business meetings and trips to attend conferences and seminars. Attending company paid training, business conventions and trade shows were also common reasons for business travel. 4 % of those who took a trip during the last two years reported receiving a paid vacation from their employer (incentive travel).

Percent of Adult Travelers (18 Plus) Taking Various Types of Out-of-Town Business Trips During the Past 2 years

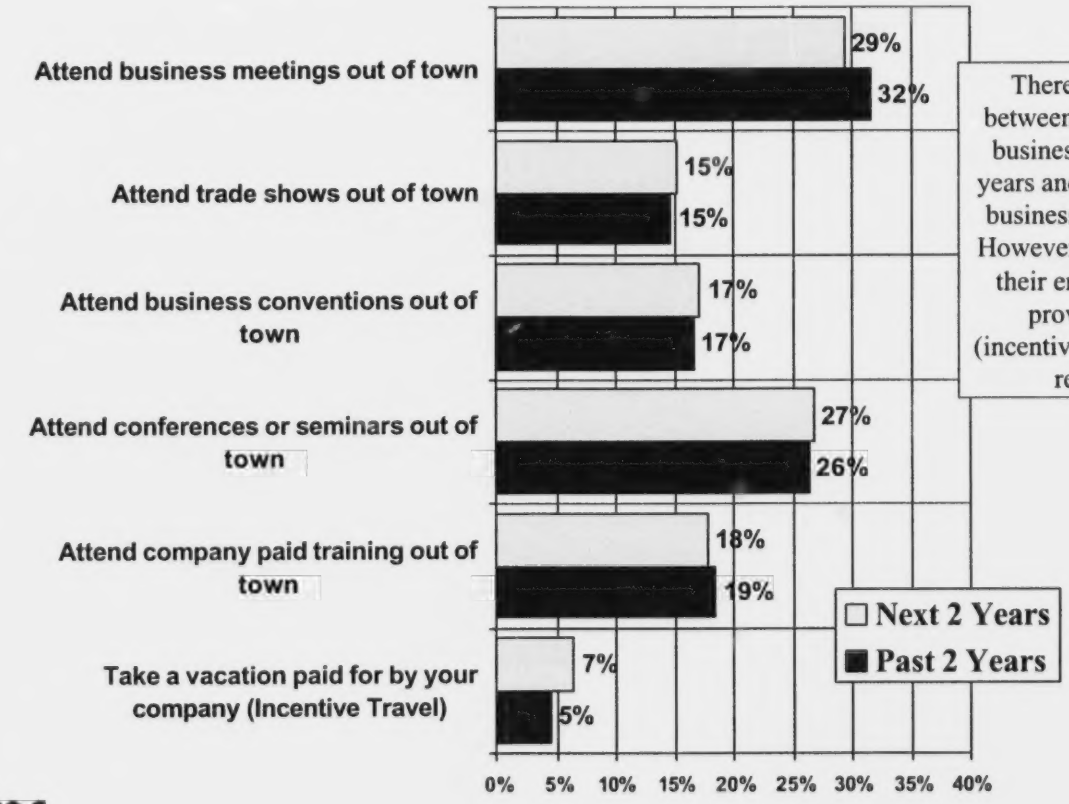
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada vs. U.S. (Mailback Survey)



Americans were considerably more likely to have taken business trips during the past two years than were Canadians. Americans were especially likely to have attended a conference or seminar in another city, to have traveled to obtain company paid training or to have received incentive vacations from their employer.

Percent of Travelers Taking Various Types of Business Trips Travel During Past Two Years versus Next Two Years

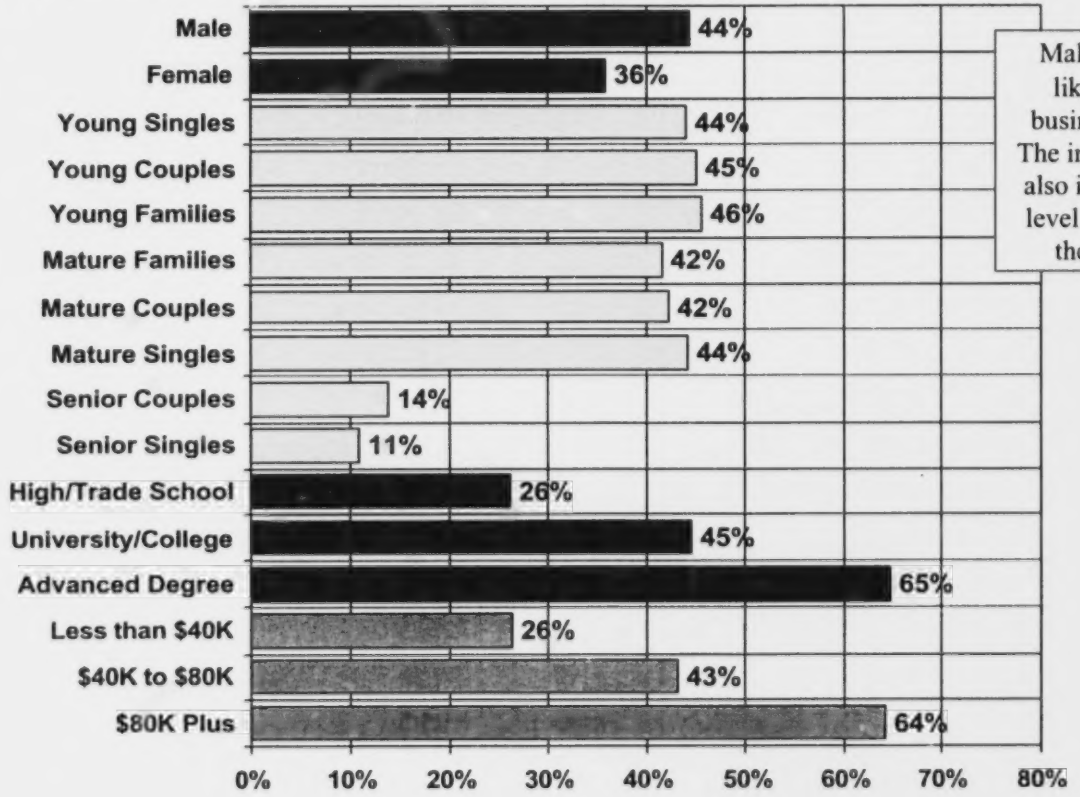
Base: Total Population (18 Plus) Who Took a Trip/Plan Last Two Years to Take A Trip in the Next Two Years: Canada & U.S.



There was relatively little difference between the incidence of various types of business travel expected in the next two years and the incidence of various types of business travel during the past two years. However, respondents were optimistic that their employer would be more likely to provide them with paid vacations (incentive travel) during the next two years relative to the last two years.

Percent Taking At Least One Out-of-Town Business Trip During the Past Two years

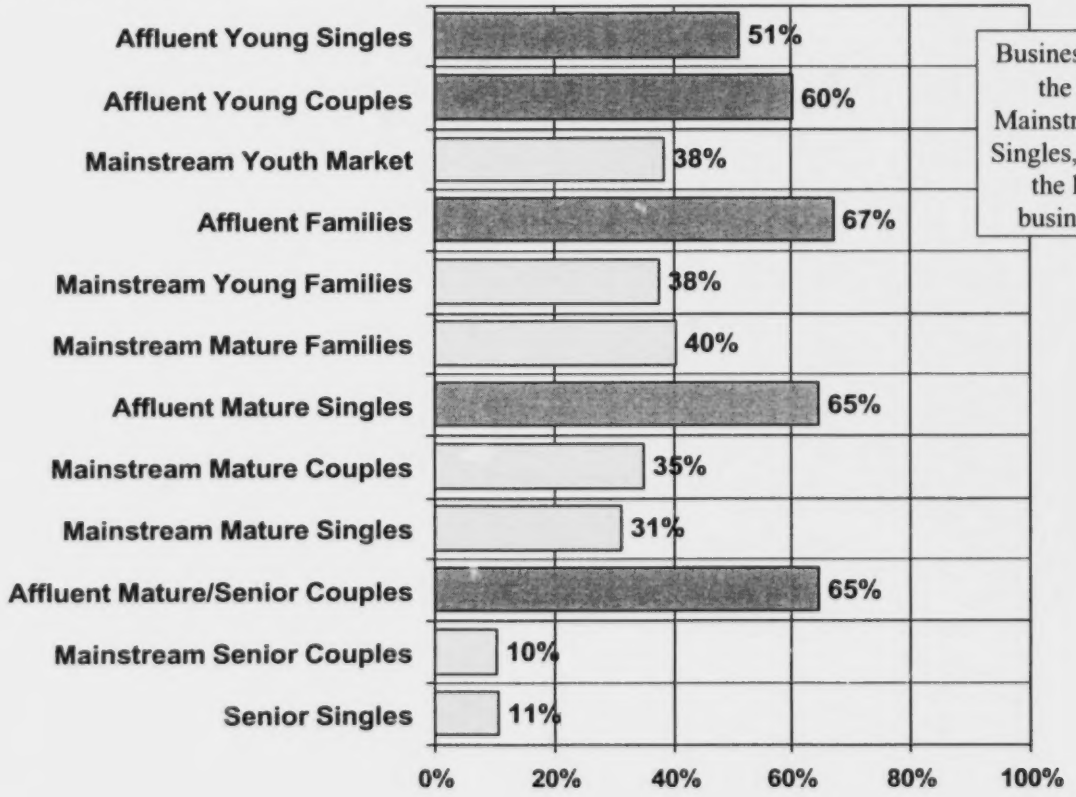
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Males were somewhat more likely to have traveled on business in the last two years. The incidence of business travel also increased as the education level and household income of the respondent increased.

Percent Taking At Least One Out-of-Town Business Trip During the Past two years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Business travel was most likely among the five affluent segments. The Mainstream Senior Couples and Senior Singles, who are primarily retired, were the least like to have traveled on business during the past two years.

Section Seventeen

Brief and Longer Pleasure Travel

Brief and Longer Pleasure Travel

- Key Findings -

Both Americans and Canadians were about 40 % more likely to take a brief (1 to 3 days) vacation than a longer (4 plus days) vacation during the winter, spring and fall seasons. This suggests that particular attention should be directed to brief vacations for off-season marketing, promotional and advertising activity.

Americans were 22 % more likely to take a brief vacation and 35 % more likely to take a longer vacation in the spring than Canadians. During the fall, Americans were 12 % more likely to take a brief vacation and 26 % more likely to take a longer vacation than Canadians. This suggests that Americans may constitute a fertile market for the promotion of shoulder season travel to Canada.

The more affluent segments of the market were more likely to take brief vacations during the winter, spring and fall seasons than the mainstream segments. Marketing activities should target more affluent markets during the non-peak travel seasons. The difference in the incidence of travel between mainstream and affluent segments was less apparent during the summer. Since the mainstream markets are much larger, these markets should be targeted during the summer travel season.

Most trips were taken with a spouse or partner, the immediate family or family members and friends. The composition of the travel party was strongly associated with the composition of the household, indicating that travel is generally taken with persons living in the household. On the other hand, singles were more likely to travel alone or with their friends.

The most common accommodations stayed in while on pleasure trips were hotels, resorts, country inns and motels. Relative to Americans, Canadians were more likely to use motorhomes, truck campers, vans and tents while on vacation. The accommodations stayed in while on vacation varied widely across the market. For example, younger travelers were more likely to camp; Affluent Young Couples, Affluent Families and Affluent Mature and Senior Couples were more likely to have stayed in bed and breakfasts and cottages; and Mainstream Mature Families and Mainstream Mature Couples were more likely to use travel trailers, truck campers and vans while on vacation. Senior Couples and Senior Singles were the most likely to have taken a scheduled group tour. These are prime markets for this type of vacation experience.

Past experience and the advice of friends and family were the most frequently used sources of information to plan vacations and especially brief vacations. The Internet was also frequently used in the planning process. Travel agents were used more often to plan longer vacations. Relative to Canadians, Americans were more likely to use the Internet, airline reservation systems and direct mail when planning their vacations.

Brief and Longer Pleasure Travel

- Research Method -

In the mailback survey, those who had traveled during the past two years were asked whether they had taken any brief (1 to 3 days) or longer (4 plus days) vacations. Those who had taken such a vacation were asked:

- What seasons of the year they had traveled
- Whom they had traveled with
- Whether the trip was part of scheduled tour
- What types of accommodations they had stayed in while on vacation
- What source of information they had used to help plan their vacations

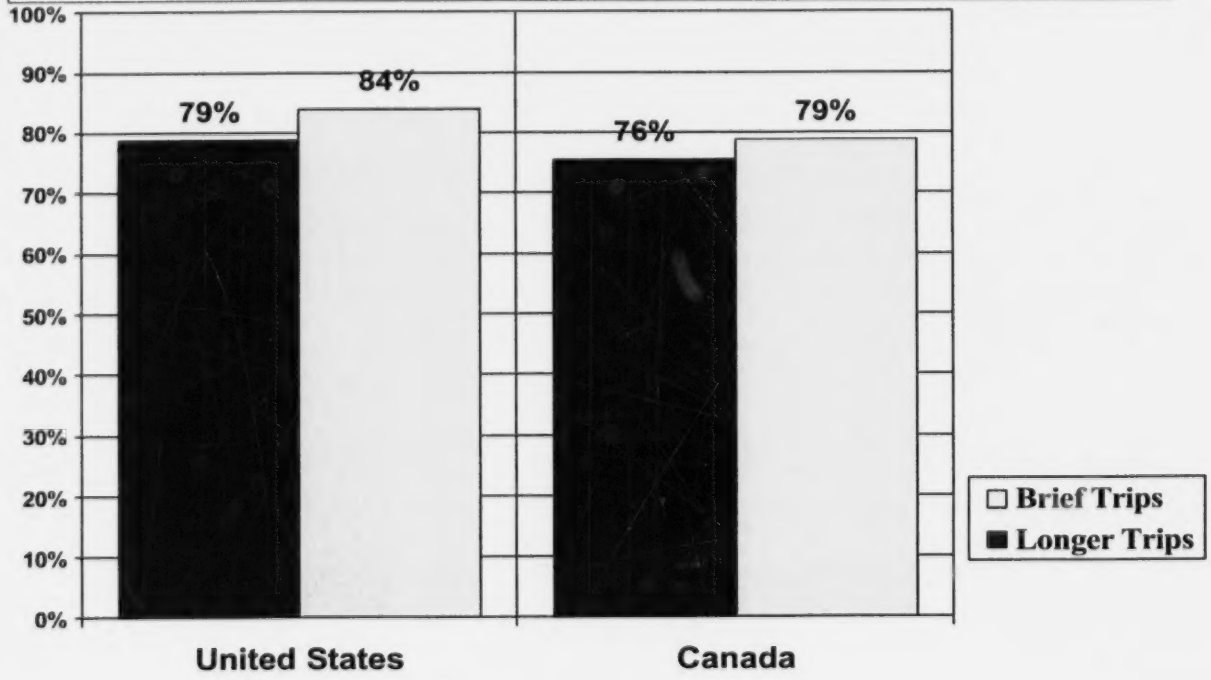
This section of the report examines brief and longer vacations and compares how the two types of vacations differ.

Percent Taking Brief and Long Trips

During Past Two Years: Canada versus U.S. (Mailback Survey)

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada vs. U.S. (Mailback Survey)

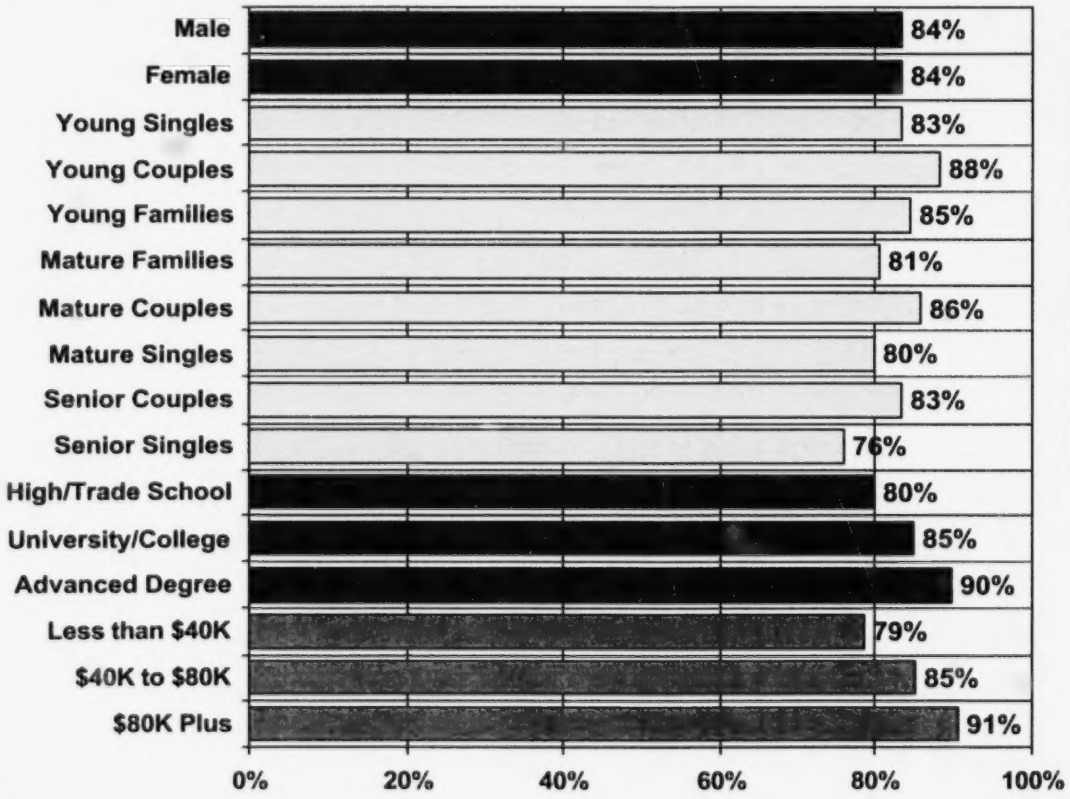
Americans were more likely to have taken both a brief and longer vacation during the past two years than Canadians. Overall, 84 % of Americans who traveled took at least one brief vacation (1 to 3 days) while 79 % took at least one longer vacation. Among Canadian respondents, 79 % and 76 % respectively, took at least one brief and one longer vacation during the past two years.



Percent Taking Brief (1 to 3 Days) Trips During Past Two Years

By Demographics

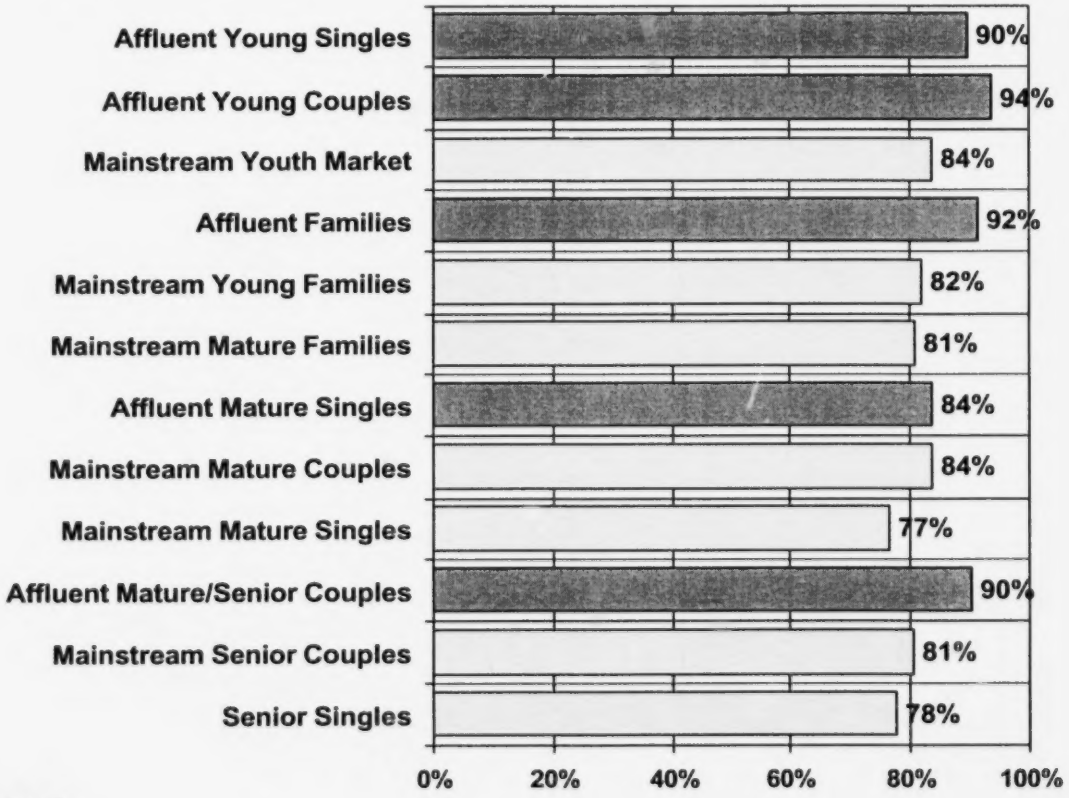
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Because of the high incidence of brief vacations (among those who traveled in the last two years), there is relatively little variation in the percent who took a brief vacation across the market. However, the incidence of brief vacations was somewhat higher among Young and Mature Couples, and moderately correlated with the education level and household income of the respondent.

Percent Taking Brief (1 to 3 Days) Trips During Past Two Years
By Market Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

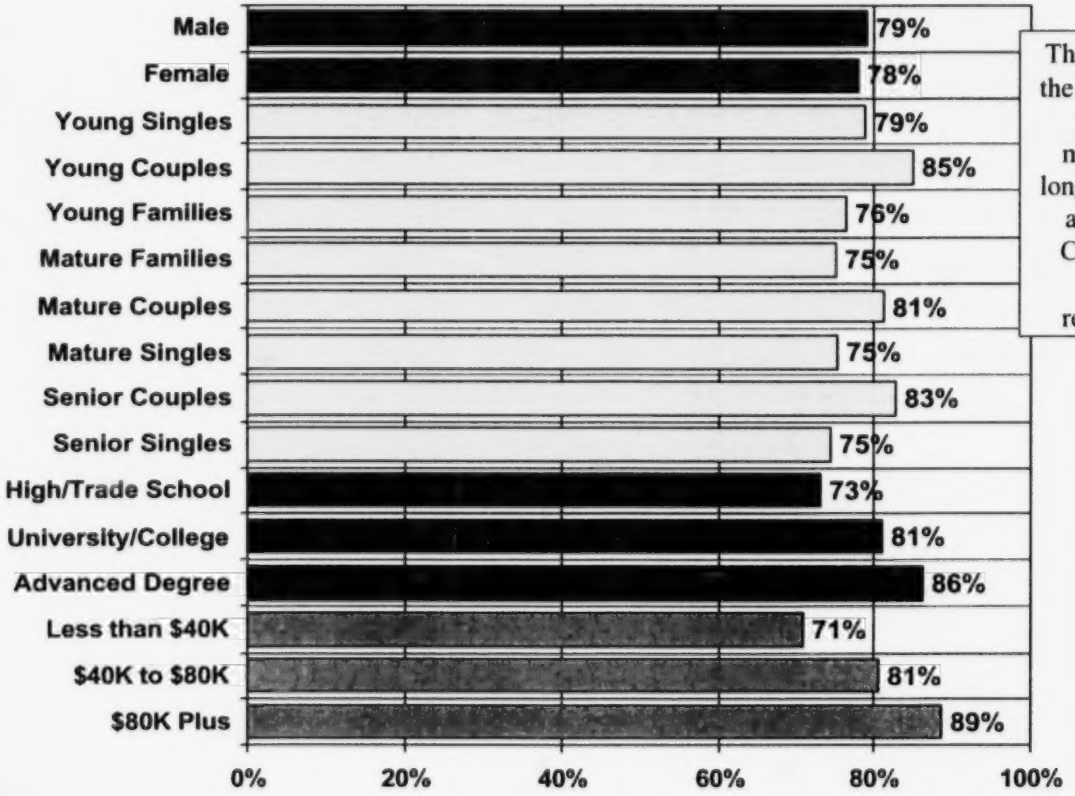


There was also relatively little variation in the incidence of brief vacations across the 12 market segments. However, the percent taking a brief vacation was somewhat higher within the affluent segments and especially the Affluent Young Singles, Affluent Young Couples, Affluent Families and Affluent Mature & Senior Couples.

Percent Taking Longer (4 Plus Days) Trips During Past Two Years

By Demographics

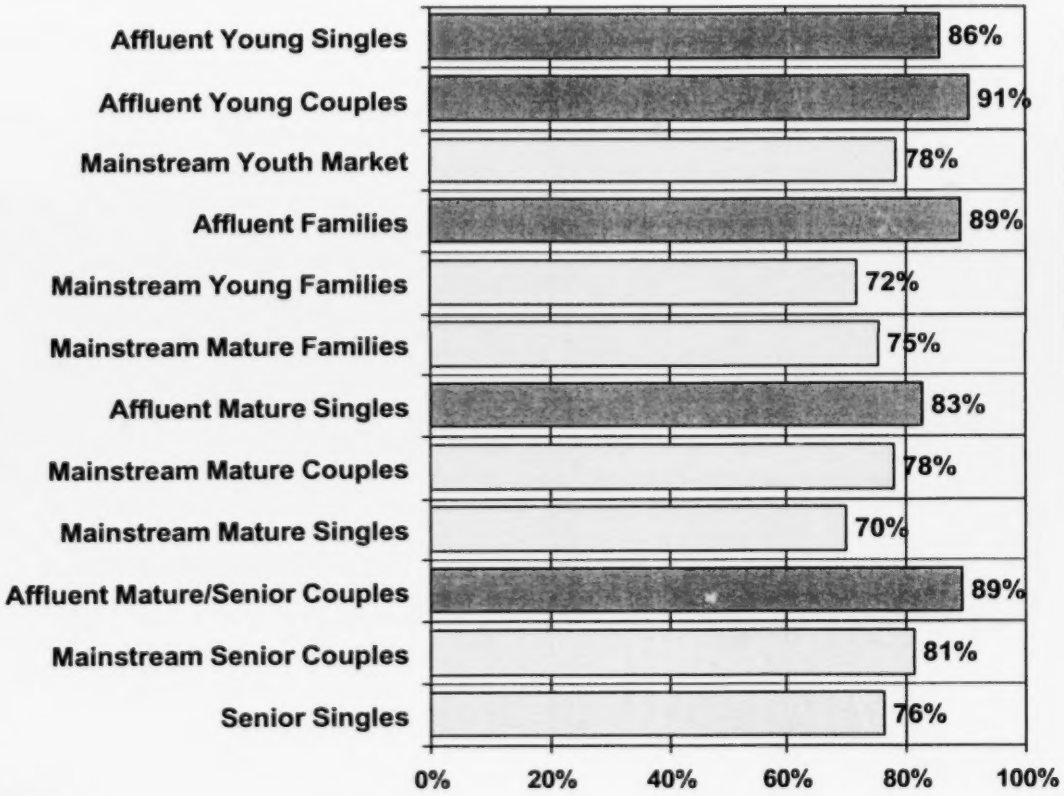
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



There was relatively little variation in the percent who took a longer pleasure trip by demographics across the market. However, the incidence of longer vacations was somewhat higher among Young, Mature and Senior Couples and moderately correlated with the education level of the respondent and household income.

Percent Taking Longer (4 Plus Days) Trips During Past Two Years
By Market Segment

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

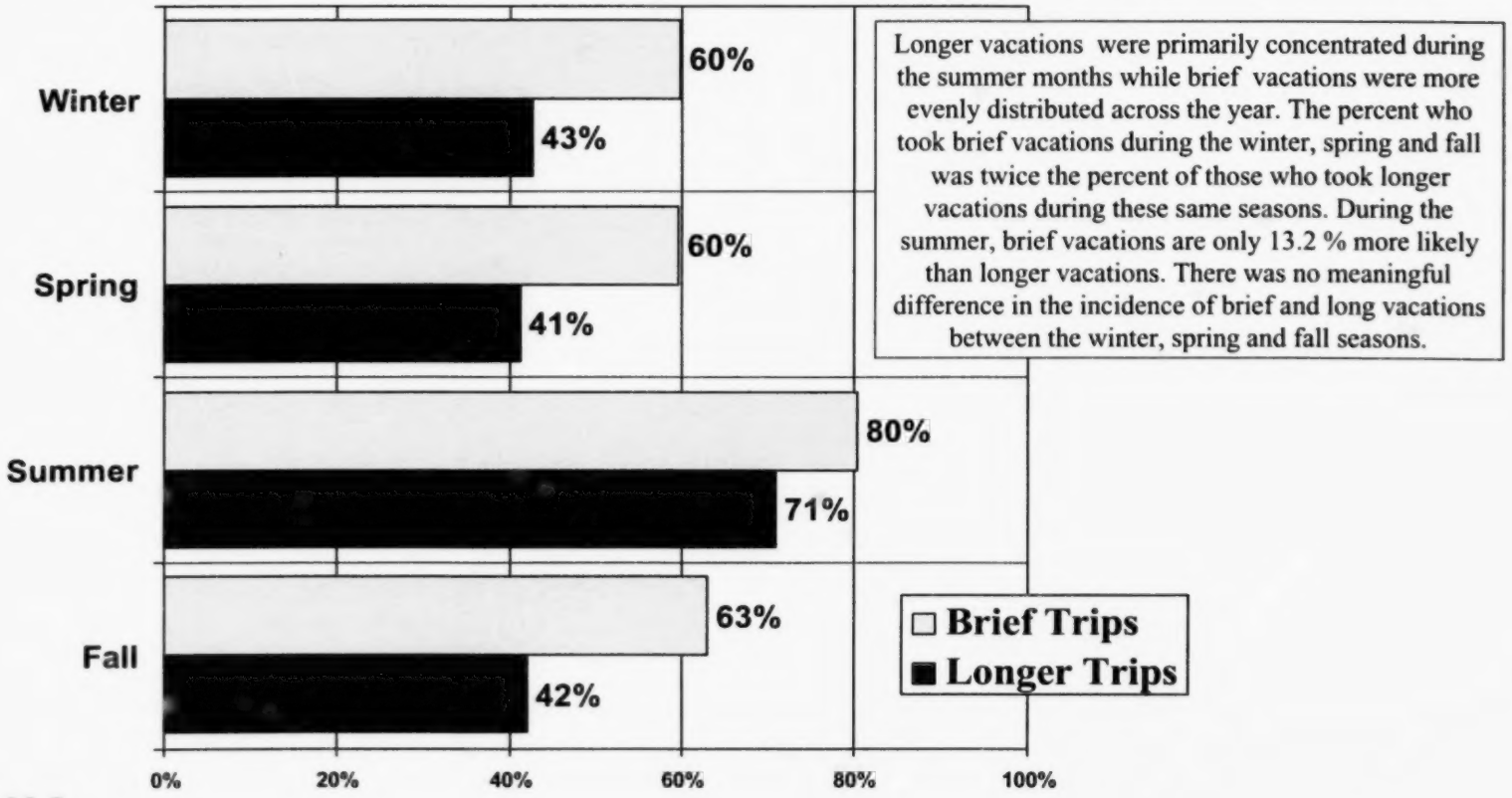


There was also relatively little variation in the incidence of longer vacations across the 12 market segments. However, the incidence of longer vacations was somewhat higher within the affluent segments and especially the Affluent Young Singles, Affluent Young Couples, Affluent Families and Affluent Mature & Senior Couples.

Percent Taking Brief & Longer Trips During Past Two Years

By Season

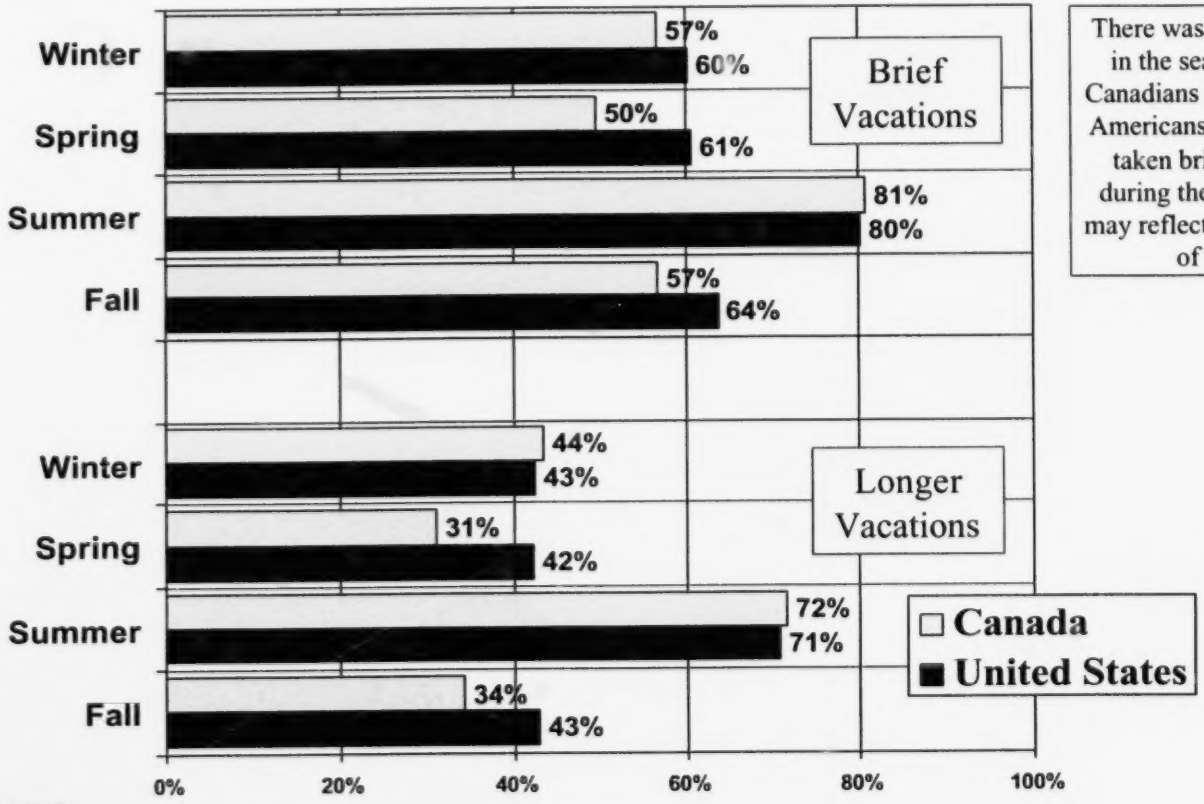
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Longer vacations were primarily concentrated during the summer months while brief vacations were more evenly distributed across the year. The percent who took brief vacations during the winter, spring and fall was twice the percent of those who took longer vacations during these same seasons. During the summer, brief vacations are only 13.2 % more likely than longer vacations. There was no meaningful difference in the incidence of brief and long vacations between the winter, spring and fall seasons.

Percent Taking Brief & Longer Trips By Season During Past Two Years: Canada versus U.S.

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

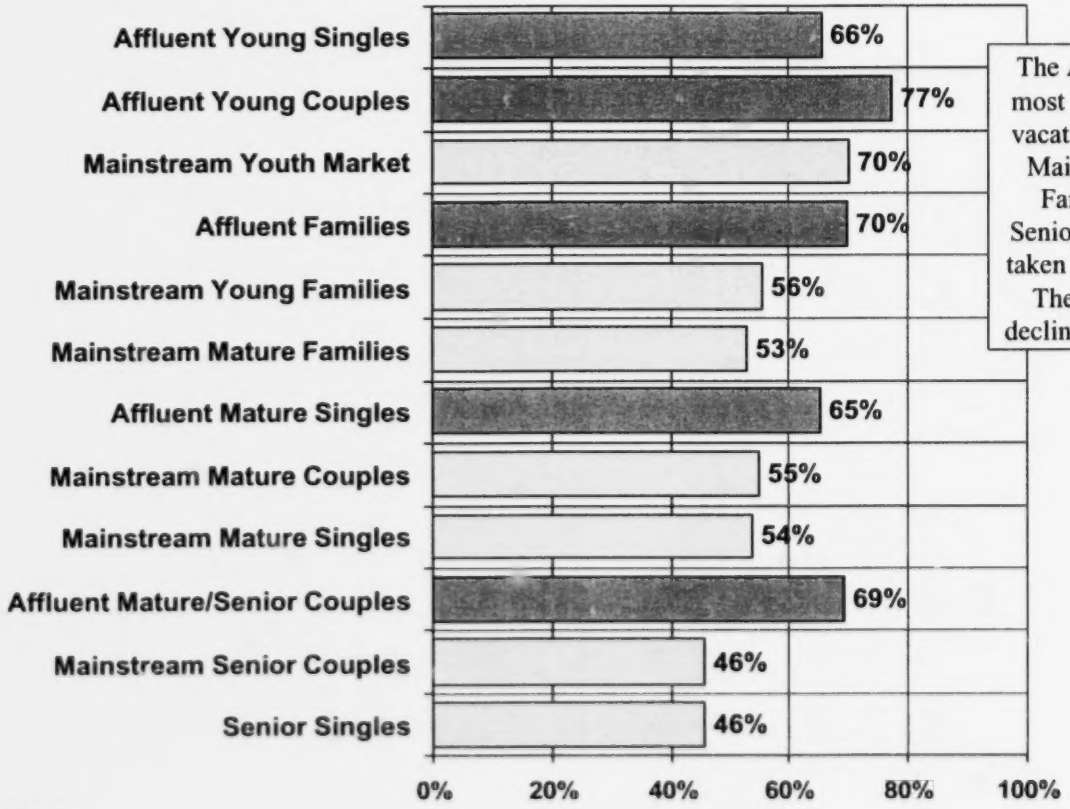


There was considerable consistency in the seasonal travel patterns of Canadians and Americans. However, Americans were more likely to have taken brief and longer vacations during the spring and the fall. This may reflect differences in the climate of the two countries.

Percent Taking Brief (1 to 3 Days) Trips During Past Two Years

Brief Winter Trips

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

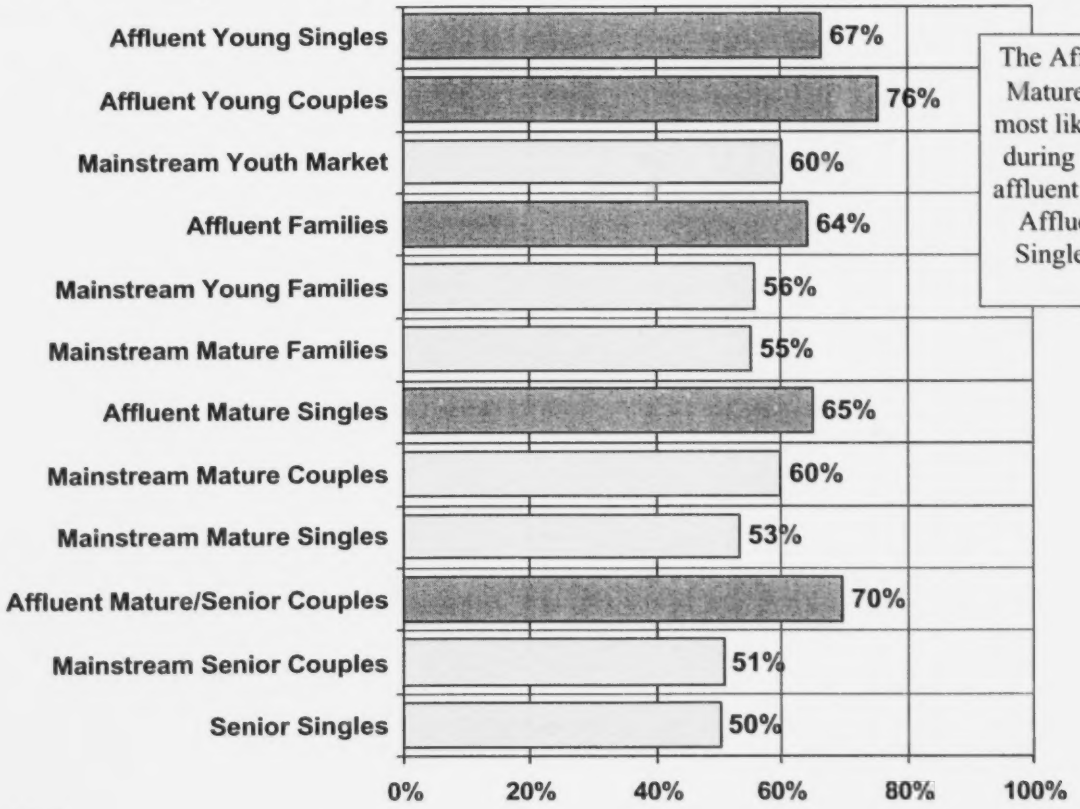


The Affluent Young Couples were the most likely to have taken a brief winter vacation during the past two years. The Mainstream Youth Market, Affluent Families and Affluent Mature and Senior Couples were also likely to have taken a brief vacation during the winter. The incidence of brief winter travel declines within the two senior segments.

Percent Taking Brief (1 to 3 Days) Trips During Past Two Years

Brief Spring Trips

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

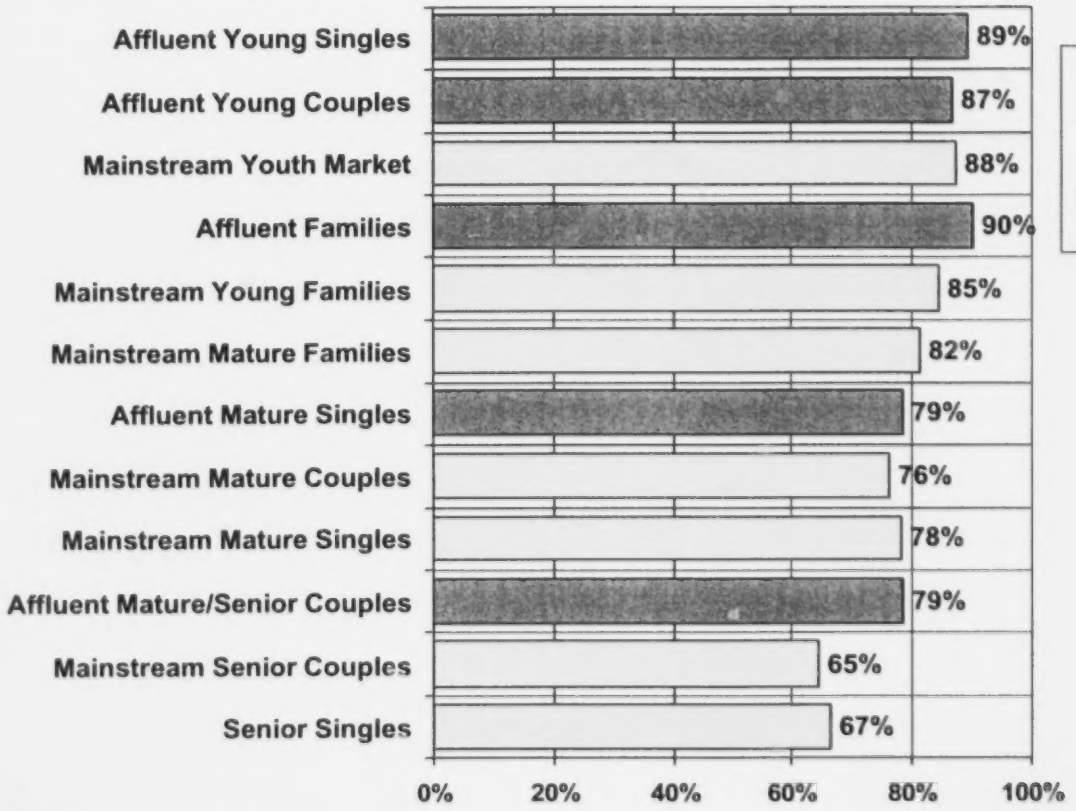


The Affluent Young Couples and Affluent Mature and Senior Couples were also the most likely to have taken a brief spring trip during the past two years. The other three affluent segments (Affluent Young Singles, Affluent Families and Affluent Mature Singles) where also more likely to have taken a brief spring trip.

Percent Taking Brief (1 to 3 Days) Trips During Past Two Years

Brief Summer Trips

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

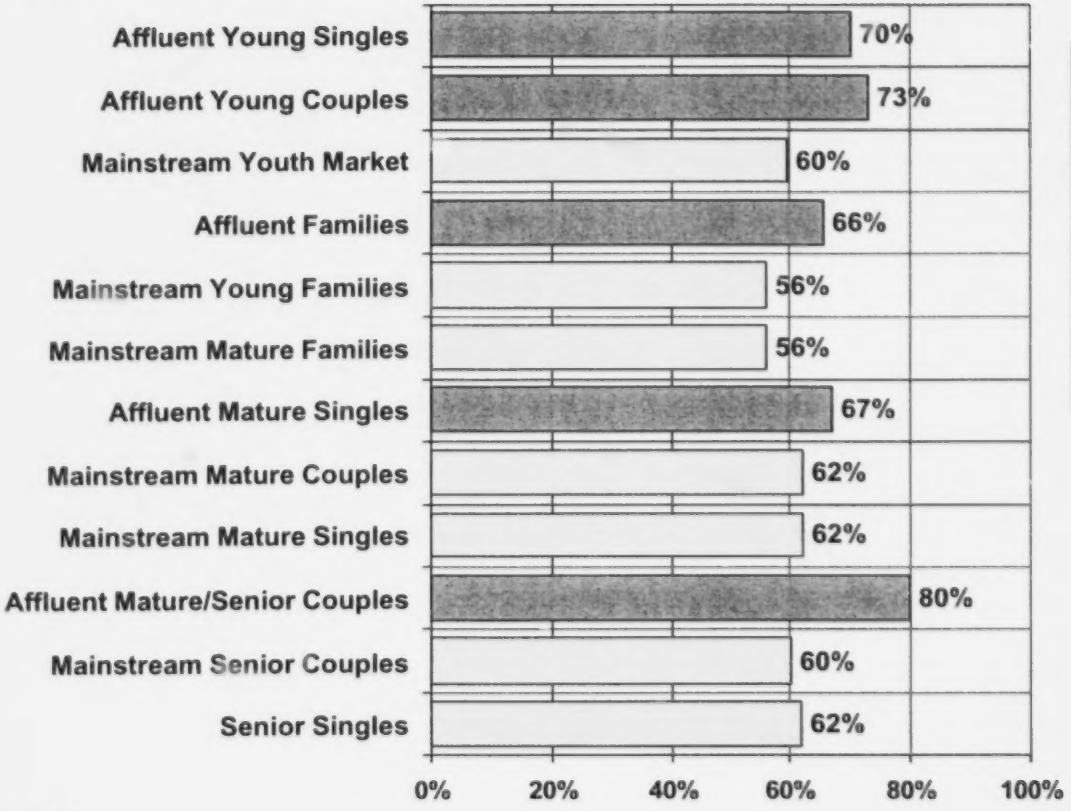


The incidence of brief summer vacations was the highest among the youth segments and among the Affluent Families. The incidence of brief summer trips tends to decline as a function of the age of the respondent.

Percent Taking Brief (1 to 3 Days) Trips During Past Two Years

Brief Fall Trips

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

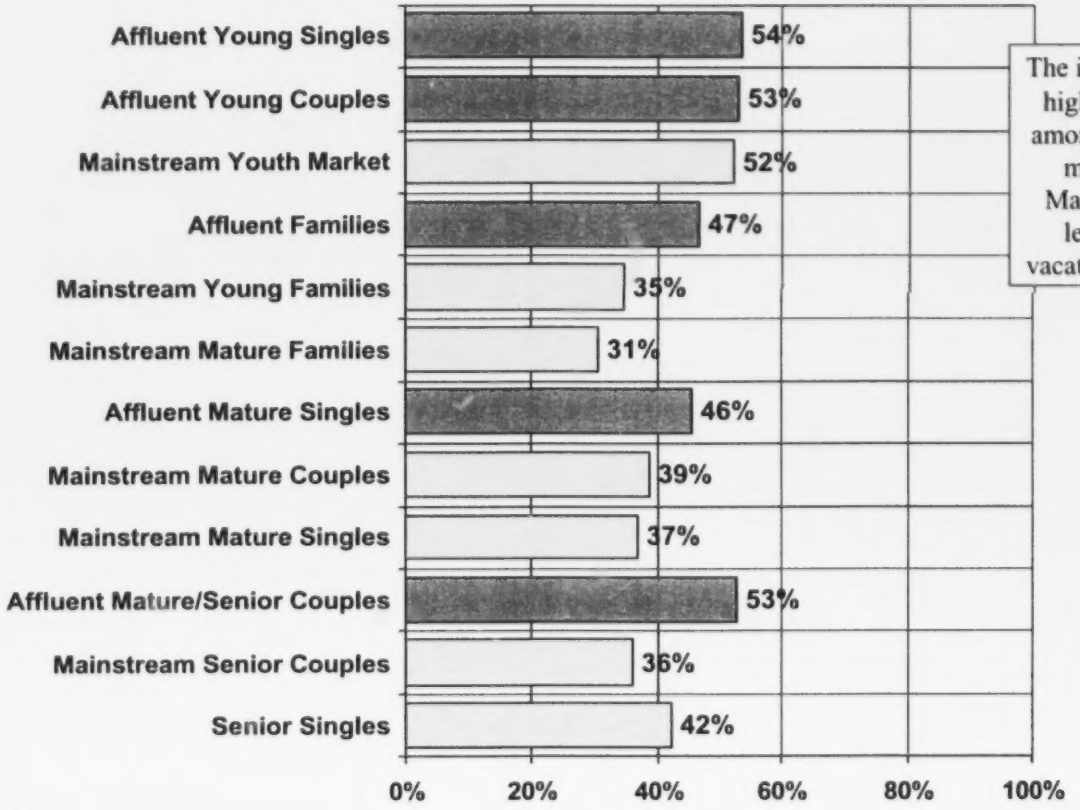


Affluent Mature and Senior Couples and Affluent Young Couples were the most likely to have taken a brief trip during the fall in the past two years, followed by the Affluent Young Couples, Affluent Young Singles and Affluent Families. Clearly, affluent households are more likely to travel during the fall travel season.

Percent Taking Longer (4 Plus Days) Trips During Past Two Years

Longer Winter Trips

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

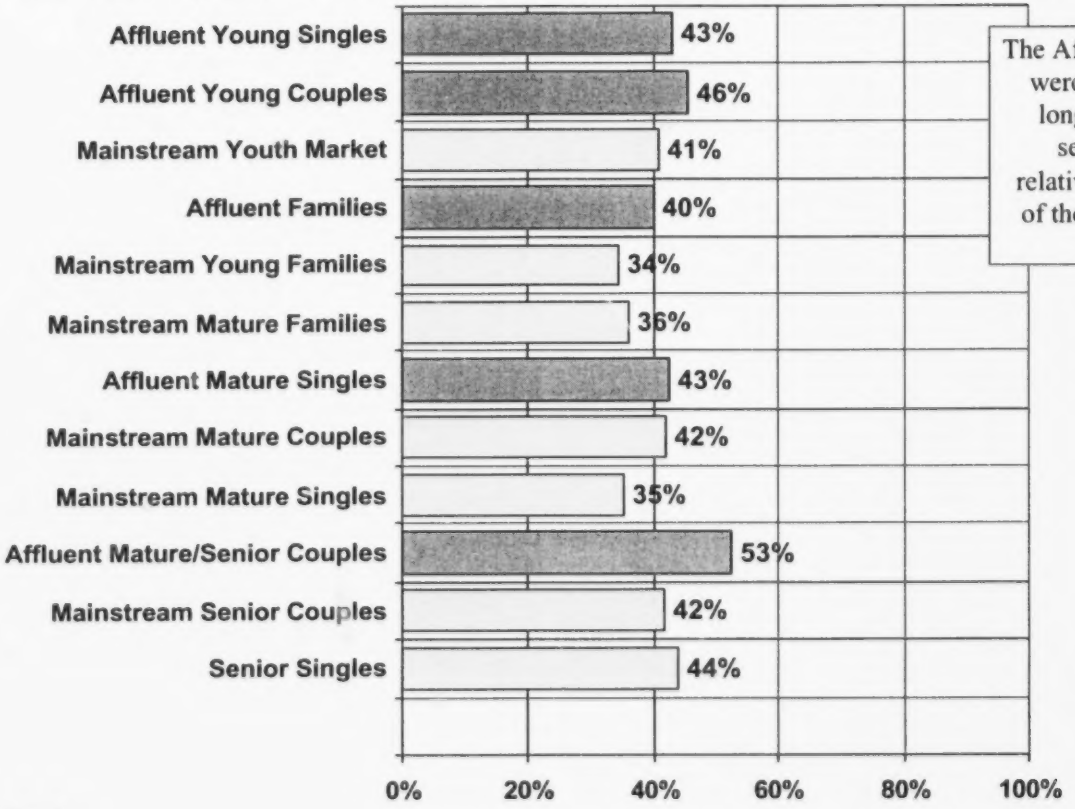


The incidence of longer winter trips was higher within the youth segments and among the five affluent segments of the market. Mainstream Families and Mainstream Senior Couples were the least likely to have taken a longer vacation during the winter travel season.

Percent Taking Longer (4 Plus Days) Trips During Past Two Years

Longer Spring Trips

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

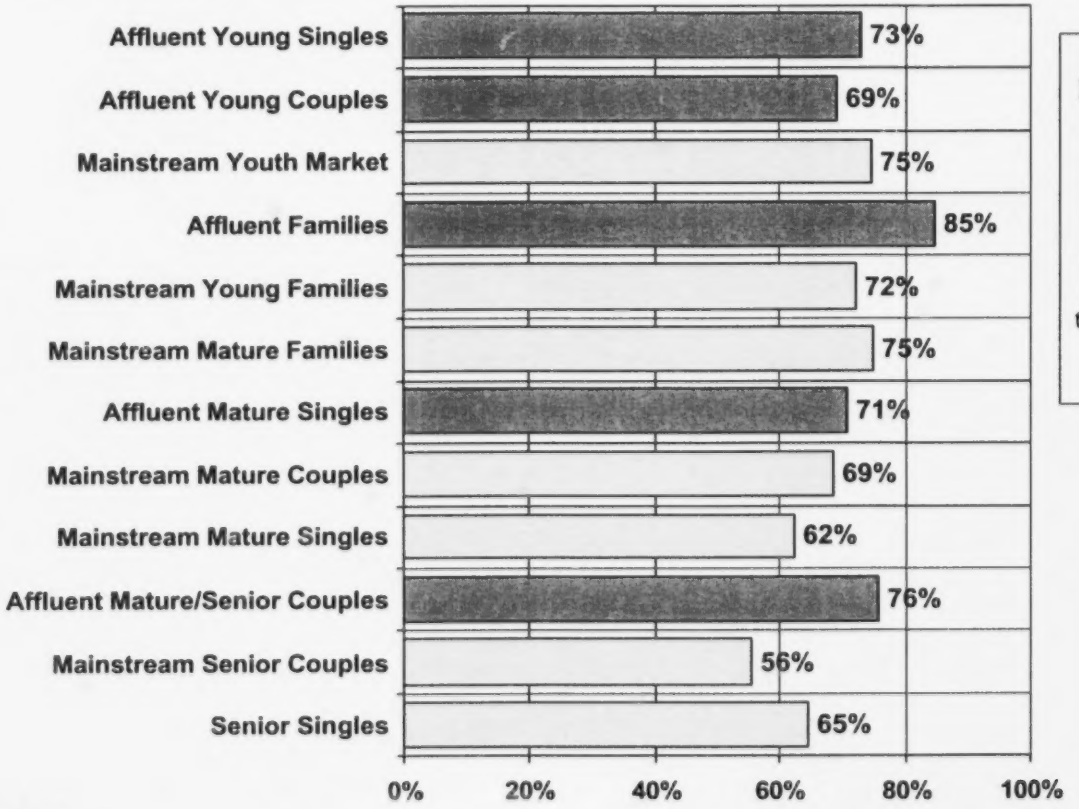


The Affluent Mature and Senior Couples were the most likely to have taken a longer trip during the spring travel season. Beyond this, there was relatively little variation in the percent of those taking longer trips during the spring.

Percent Taking Longer (4 Plus Days) Trips During Past Two Years

Longer Summer Trips

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

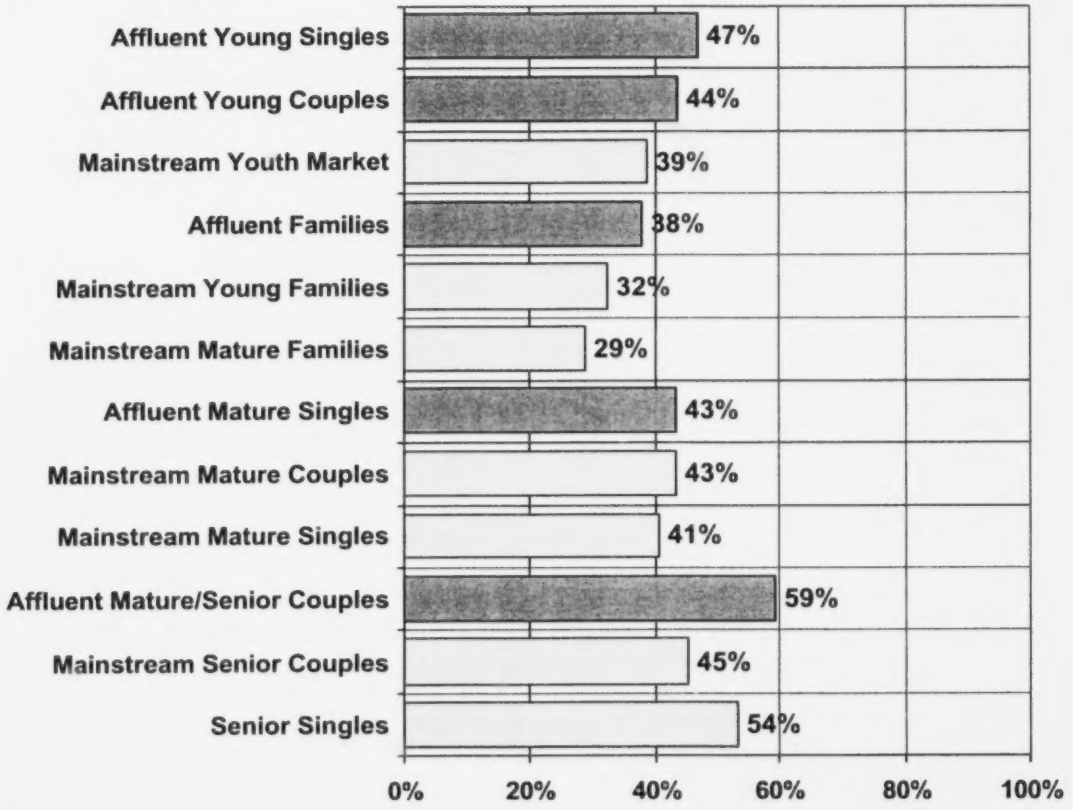


Affluent Families and Affluent Mature and Senior Couples were the most likely to have taken a longer summer trip during the past two years. Mainstream Mature Singles and Mainstream Senior Couples were the least likely to have taken a longer summer trip. Beyond this, there was relatively little variation in the incidence of longer summer vacations across the segments.

Percent Taking Longer (4 Plus Days) Trips During Past Two Years

Longer Fall Trips

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

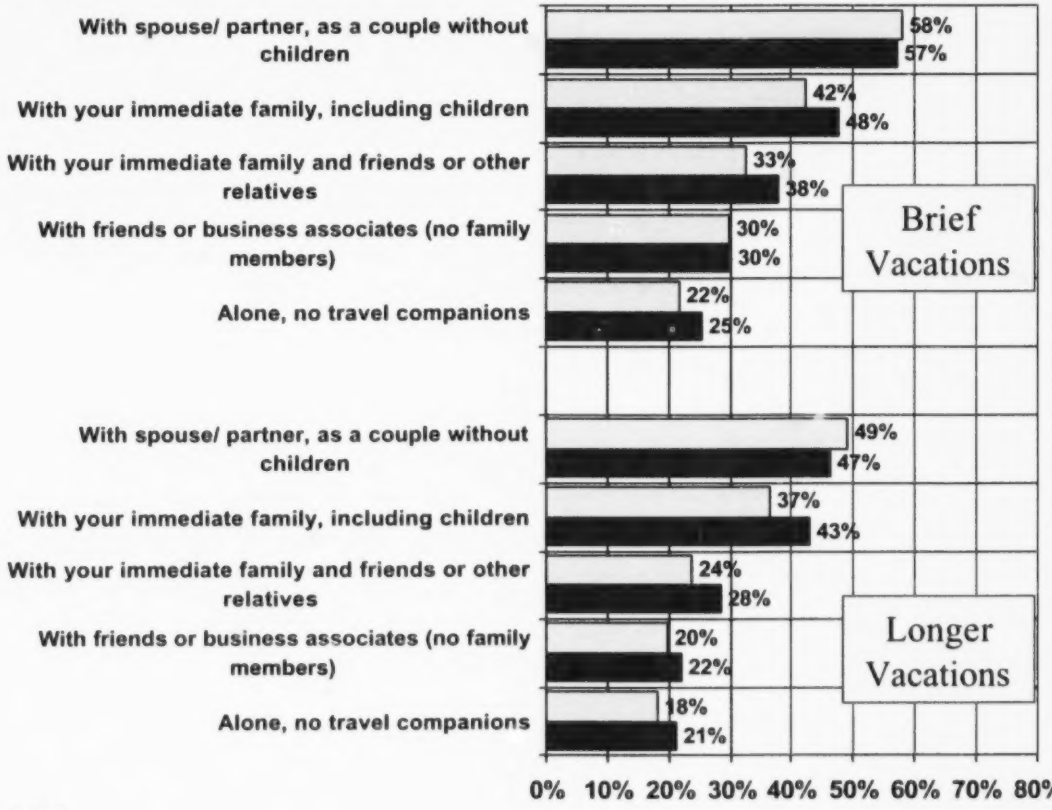


The incidence of longer fall trips was highest among the Affluent Mature and Senior Singles. The Mainstream Young Families and Mainstream Mature Families were the least likely to have taken a longer vacation during the fall travel season.

Travel Companions: Brief vs. Longer Trips

During Past Two Years: Canada and U.S. (Mailback Survey)

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



A spouse or partner was the most frequent travel companion for both brief and longer vacations. Traveling with the immediate family or traveling with the immediate family as well as friends or relatives were also common among travel groups. About one in four brief trips and one in five longer trips were taken with friends or business associates. As well, about one in five trips were taken alone. Americans, who take more brief and longer vacations, were likely to report a higher incidence of travel for each type of group composition, except for travel with a spouse or partner.

Travel Companions: Brief vs. Longer Trips

Young Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Not surprisingly, the composition of the travel party varied widely with the lifecycle stage of the respondent. Thus, Affluent Young Singles and the Mainstream Youth Market were more likely to have traveled with friends or business associates, a partner or alone, while the Affluent Young Couples were most likely to have traveled as a couple or with their family and friends.

	Brief Vacations	Longer Vacations
Affluent Young Singles:	Friends/Associates (60.2 %)	Friends/Associates (44.7 %)
	Alone (46.1 %)	Alone (42.8 %)
	Partner (44.7 %)	Immediate family/children (41.7 %)
Affluent Young Couples:	Spouse or partner (95.3 %)	Spouse or partner (88.8 %)
	Family & friends (44.7 %)	Family & friends (28.5 %)
	Friends/Associates (36.3 %)	Friends/Associates (22.1 %)
Mainstream Youth Market:	Friends/Associates (52.8 %)	Friends/Associates (37.8 %)
	Partner (46.5 %)	Alone (36.5 %)
	Family & friends (41.7 %)	Partner (35.4 %)

Travel Companions: Brief vs. Longer Trips

Family Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

As would be expected, the family segments were most likely to travel with their immediate family including children. Traveling as couples was also quite common, especially among Affluent Families and Mainstream Mature Families. Brief vacations with family and friends were also not uncommon among these segments.

	Brief Vacations	Longer Vacations
Affluent Families:	Immediate family/children (86.7 %)	Immediate family/children (83.1 %)
	Spouse or partner (64.1 %)	Spouse or partner (40.6 %)
	Family & friends (47.3 %)	Family & friends (35.3 %)
Mainstream Young Families:	Immediate family/children (81.0 %)	Immediate family/children (73.0 %)
	Spouse or partner (48.8 %)	Family & friends (29.9 %)
	Family & friends (43.2 %)	Spouse or partner (29.4 %)
Mainstream Mature Families:	Immediate family/children (70.6 %)	Immediate family/children (68.4 %)
	Spouse or partner (52.3 %)	Spouse or partner (36.3 %)
	Family & friends (42.6 %)	Family & friends (30.1 %)

Travel Companions: Brief vs. Longer Trips

Mature Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Affluent Mature Singles and Mainstream Mature Singles were most likely to have traveled alone. Trips with friends or business associates or a partner were also not uncommon within these segments. Mainstream Mature Couples on the other hand were more likely to travel as couples, followed by travel with family or friends and their immediate families.

	Brief Vacations	Longer Vacations
Affluent Mature Singles:	Alone (57.3 %)	Alone (44.8 %)
	Friends/Associates (45.4 %)	Friends/Associates (34.8 %)
	Partner (40.3 %)	Partner (31.4 %)
Mainstream Mature Couples:	Spouse or partner (86.5 %)	Spouse or partner (79.9 %)
	Family & friends (34.5 %)	Immediate family/children (26.6 %)
	Immediate family/children (29.1 %)	Family & friends (24.9 %)
Mainstream Mature Singles:	Alone (50.5 %)	Alone (40.2 %)
	Friends/Associates (35.8 %)	Immediate family/children (27.5 %)
	Immediate family/children (33.6 %)	Friends/Associates (27.4 %)

Travel Companions: Brief vs. Longer Trips

Mature/Senior Segments

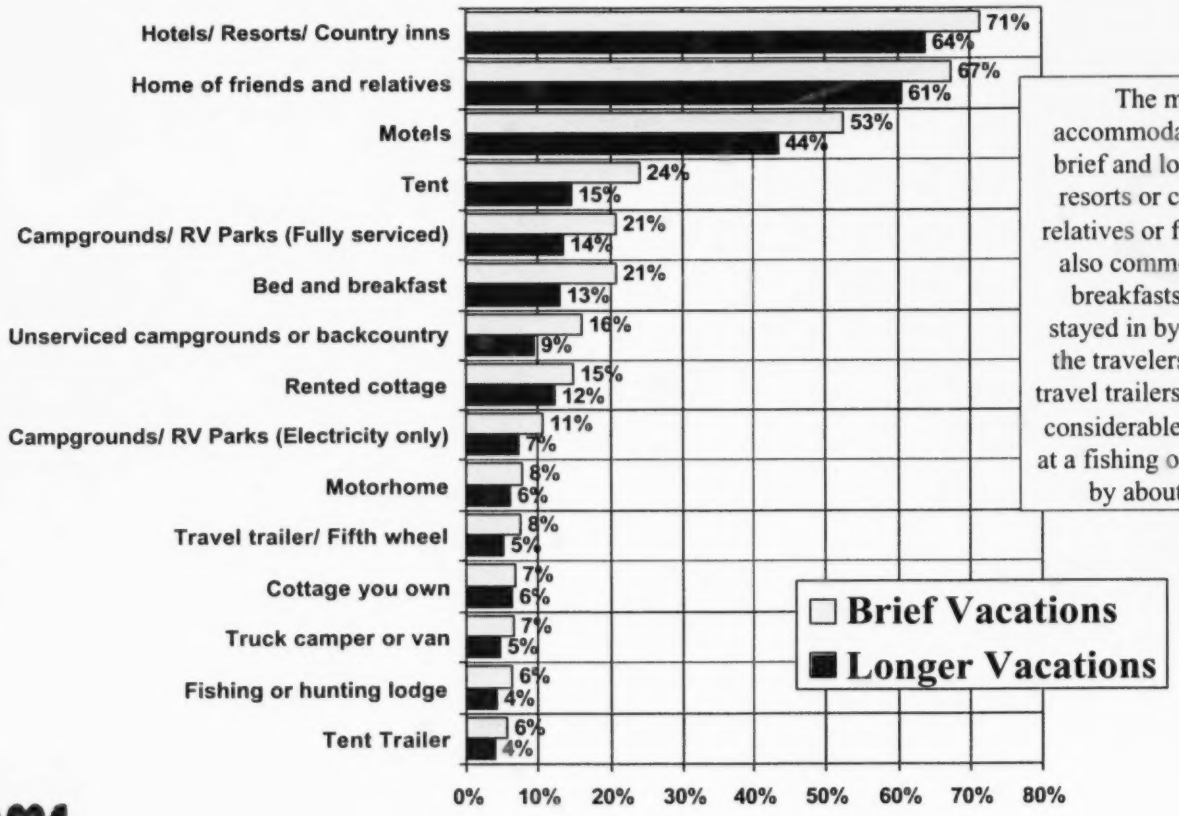
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Affluent Mature and Senior Couples and Mainstream Senior Singles were very likely to traveled as a couple. Travel with family and friends or with their immediate family was also likely, but with less frequency, within these segments. Mainstream Mature Singles were more likely to travel alone or with friends or business associates, but they also took occasionally trips with their immediate families or children.

	Brief Vacations	Longer Vacations
Affluent Mature/Senior Couples:	Spouse or partner (90.9 %)	Spouse or partner (88.4 %)
	Family & Friends (34.1 %)	Immediate family/children (27.8 %)
	Immediate family/children (33.6 %)	Family & Friends (25.8 %)
Mainstream Senior Couples:	Spouse or partner (82.3 %)	Spouse or partner (77.0 %)
	Immediate family/children (21.0 %)	Immediate family/children (18.3 %)
	Family & friends (16.7 %)	Family & friends (12.3 %)
Mainstream Senior Singles:	Alone (38.6 %)	Alone (41.1 %)
	Friends/Associates (30.0 %)	Friends/Associates (28.7 %)
	Immediate family/children (28.8 %)	Immediate family/children (25.9 %)

Percent Staying in Various Types of Accommodations
Brief versus Longer Pleasure Trips During Past Two Years

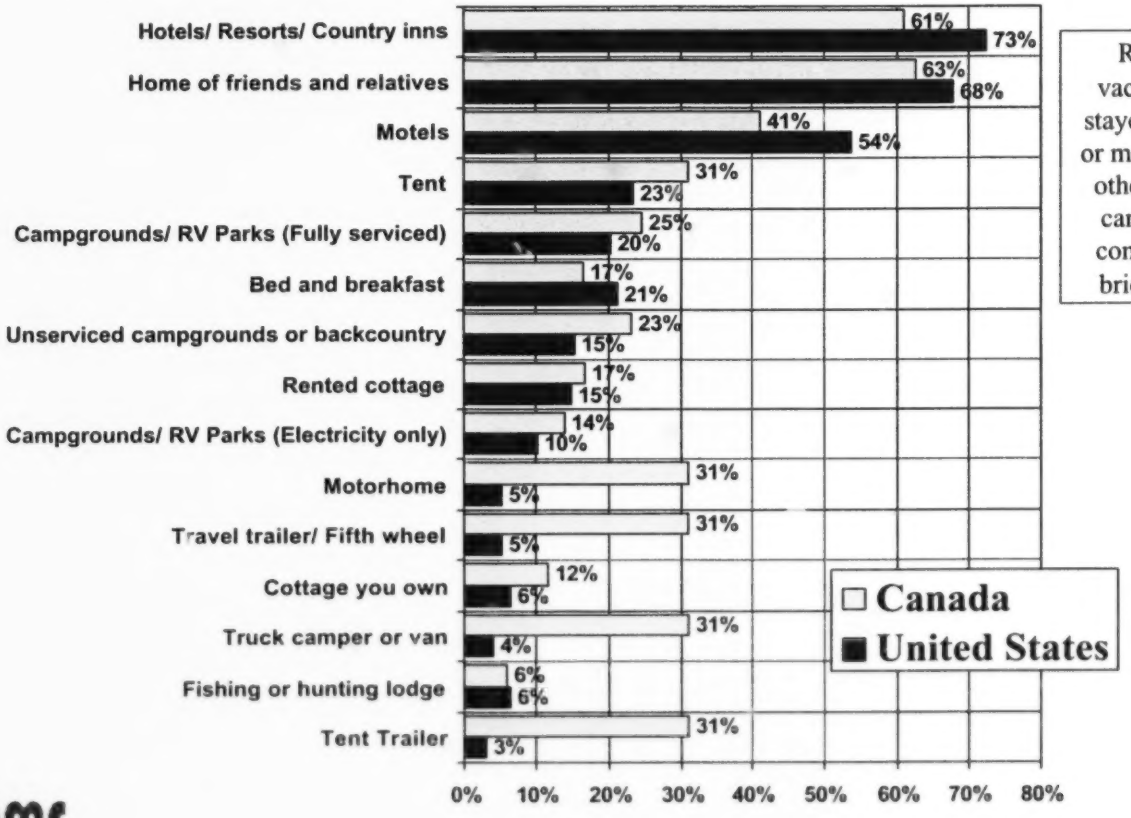
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



The most common types of accommodations stayed in during both brief and longer vacations were hotels, resorts or country inns or the home of relatives or friends. Stays in motels were also common. Campgrounds, bed and breakfasts and rented cottages were stayed in by between 10 % and 20 % of the travelers. Travel with motorhomes, travel trailers, truck campers or vans were considerable less common while staying at a fishing or hunting lodge was reported by about 5 % of the vacationers.

Percent Staying in Various Types of Accommodations
Brief Vacations: Canada versus United States

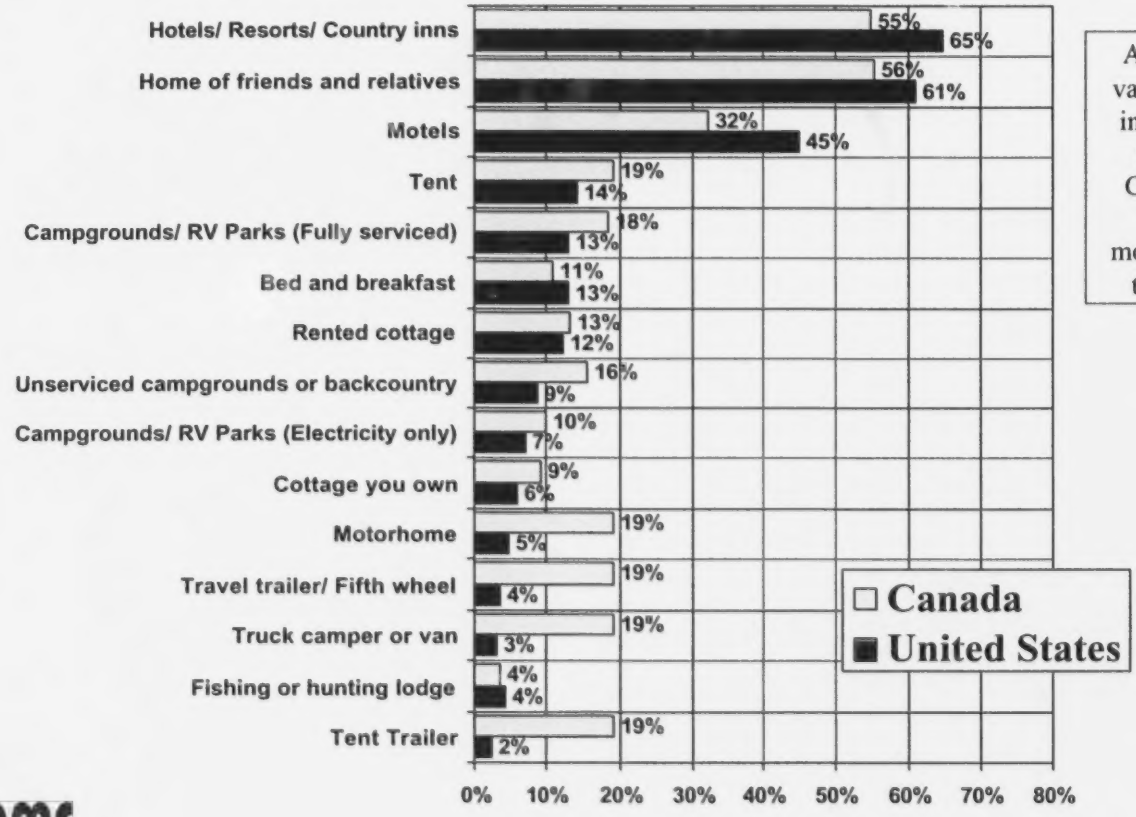
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to Canadians, American vacationers were more likely to have stayed in hotels, resorts or country inns or motels during brief vacations. On the other hand, using a motorhome, truck camper, van or tent trailer was more common among Canadians who took brief vacations in the past two years.

Percent Staying in Various Types of Accommodations
Longer Vacations: Canada versus United States

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

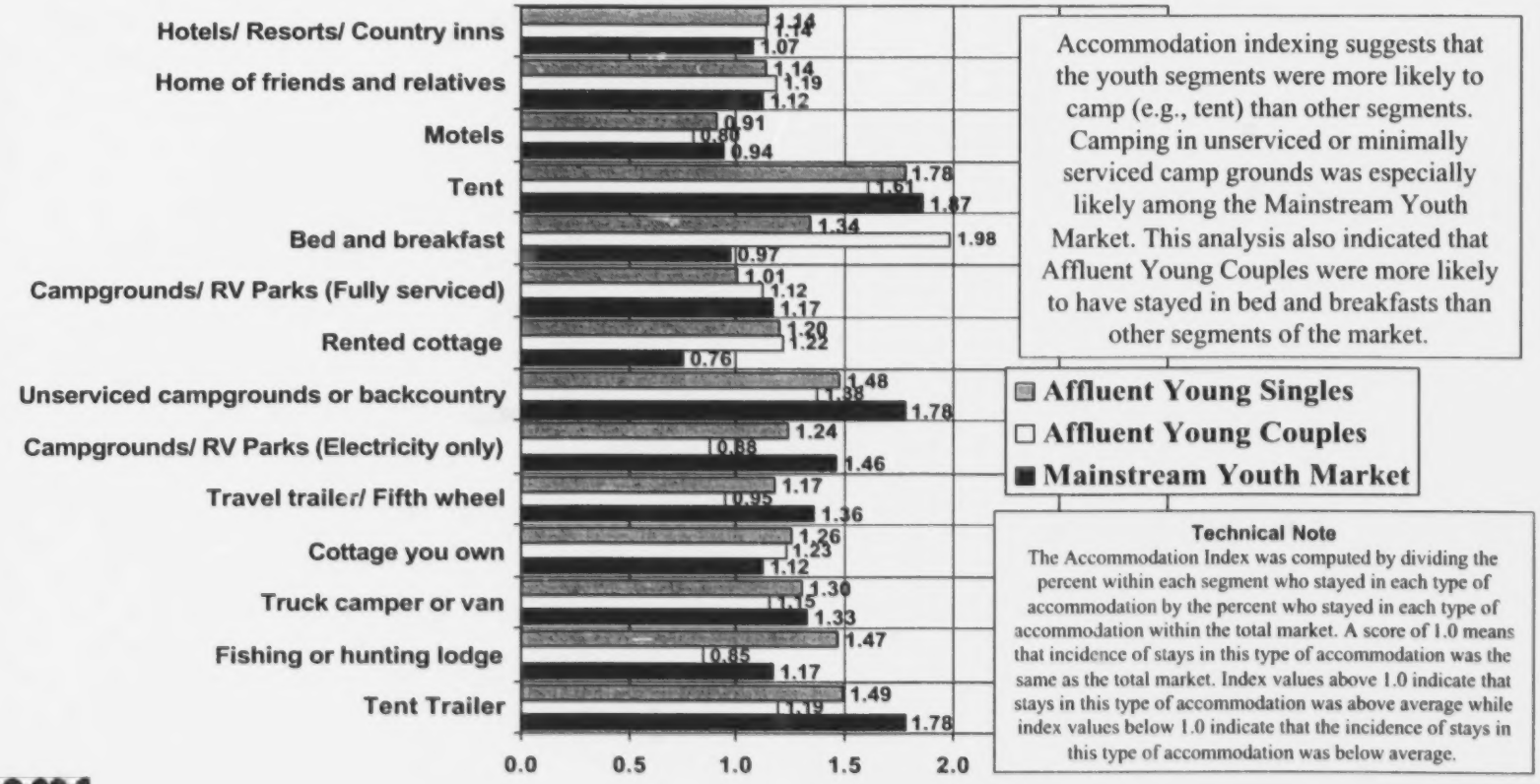


As with brief vacations, American vacationers were more likely to stay in hotels, resorts or country inns or motels during longer vacations. Canadians, relative to Americans, were more likely to have used motorhomes, truck campers, vans or tent trailers for longer vacations.

Indexing for Accommodations Stayed In: Brief & Longer Vacations

Young Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Accommodation indexing suggests that the youth segments were more likely to camp (e.g., tent) than other segments. Camping in unserviced or minimally serviced camp grounds was especially likely among the Mainstream Youth Market. This analysis also indicated that Affluent Young Couples were more likely to have stayed in bed and breakfasts than other segments of the market.

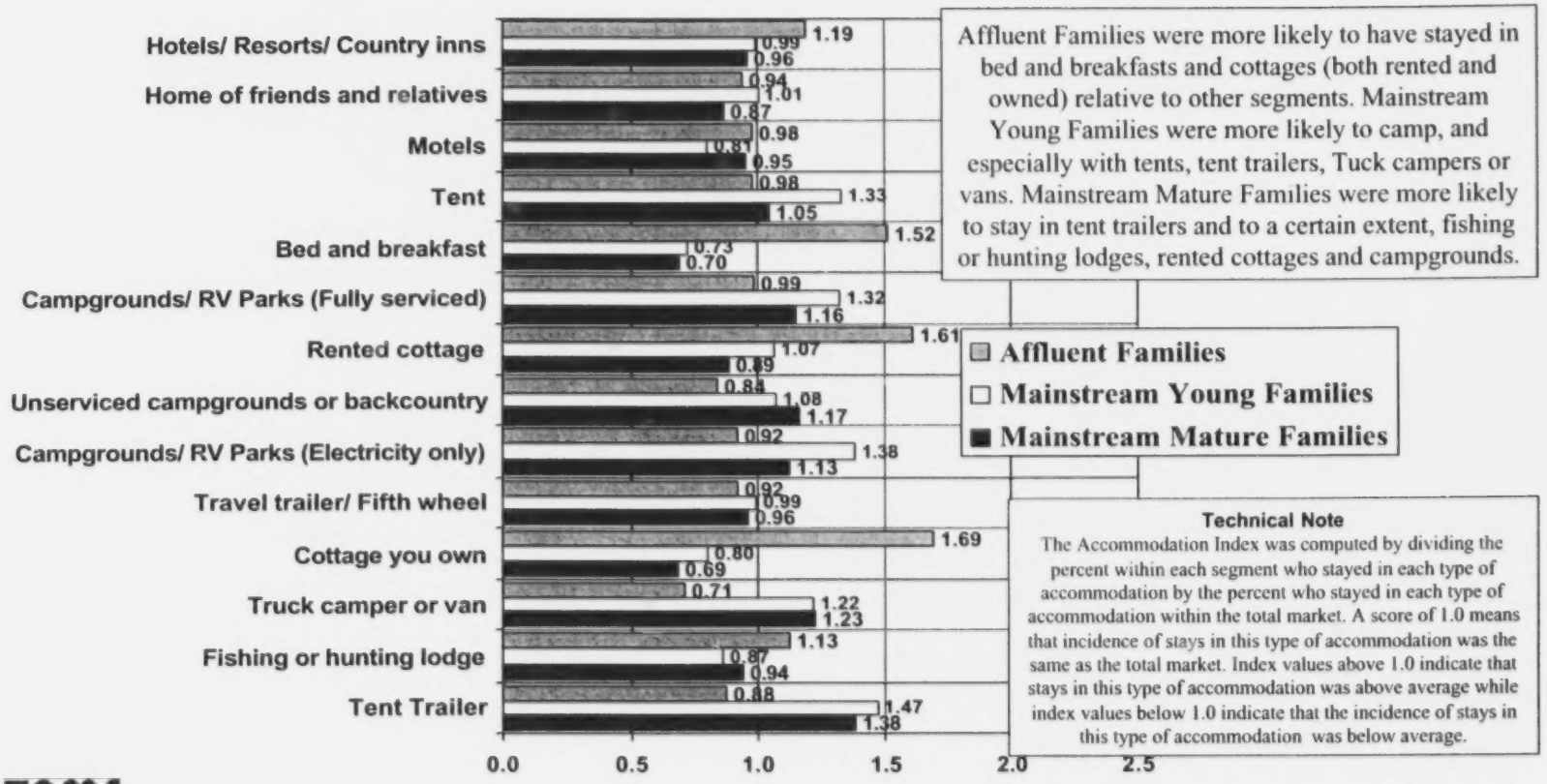
Technical Note

The Accommodation Index was computed by dividing the percent within each segment who stayed in each type of accommodation by the percent who stayed in each type of accommodation within the total market. A score of 1.0 means that incidence of stays in this type of accommodation was the same as the total market. Index values above 1.0 indicate that stays in this type of accommodation was above average while index values below 1.0 indicate that the incidence of stays in this type of accommodation was below average.

Indexing for Accommodations Stayed In: Brief & Longer Vacations

Family Segments

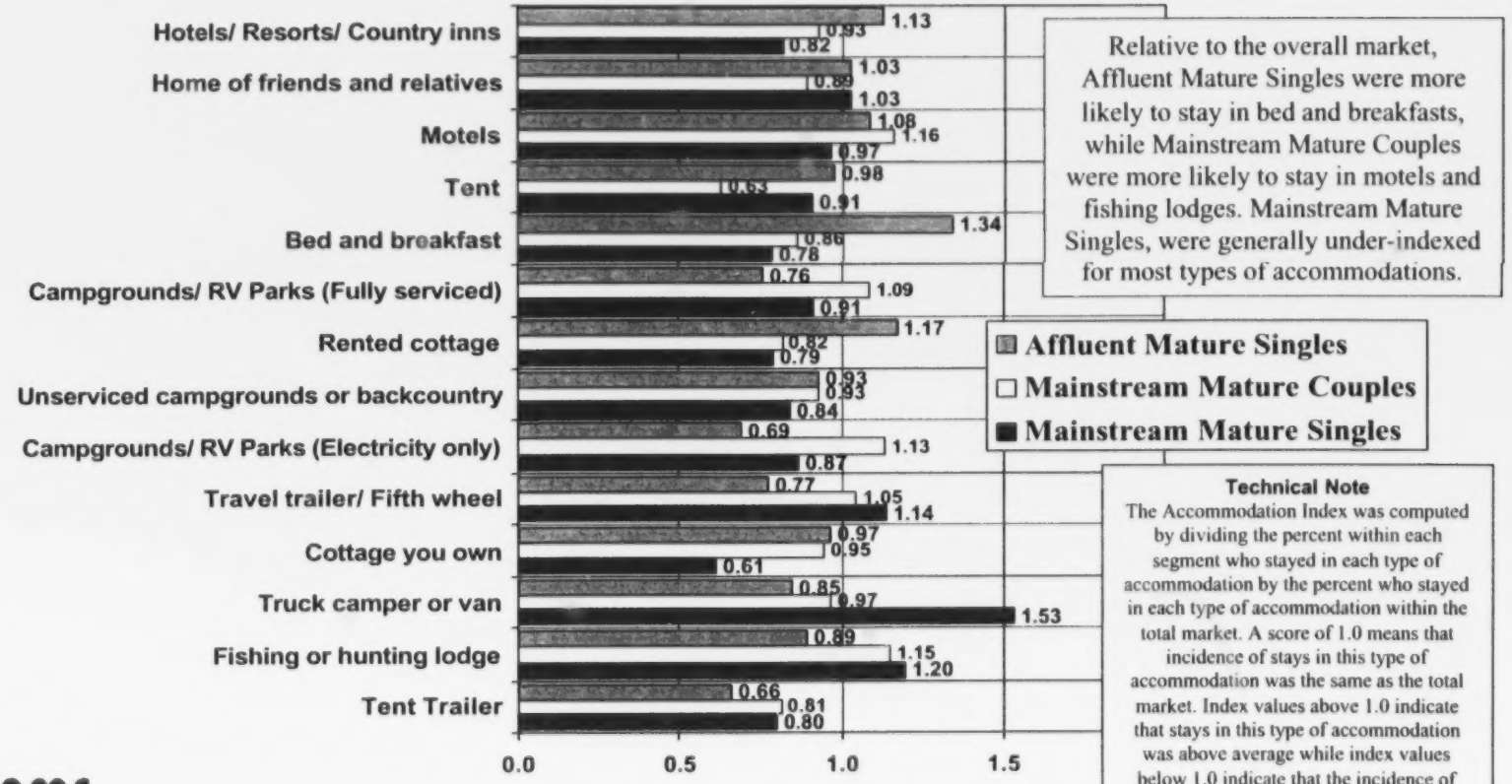
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Indexing for Accommodations Stayed In: Brief & Longer Vacations

Mature Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the overall market, Affluent Mature Singles were more likely to stay in bed and breakfasts, while Mainstream Mature Couples were more likely to stay in motels and fishing lodges. Mainstream Mature Singles, were generally under-indexed for most types of accommodations.

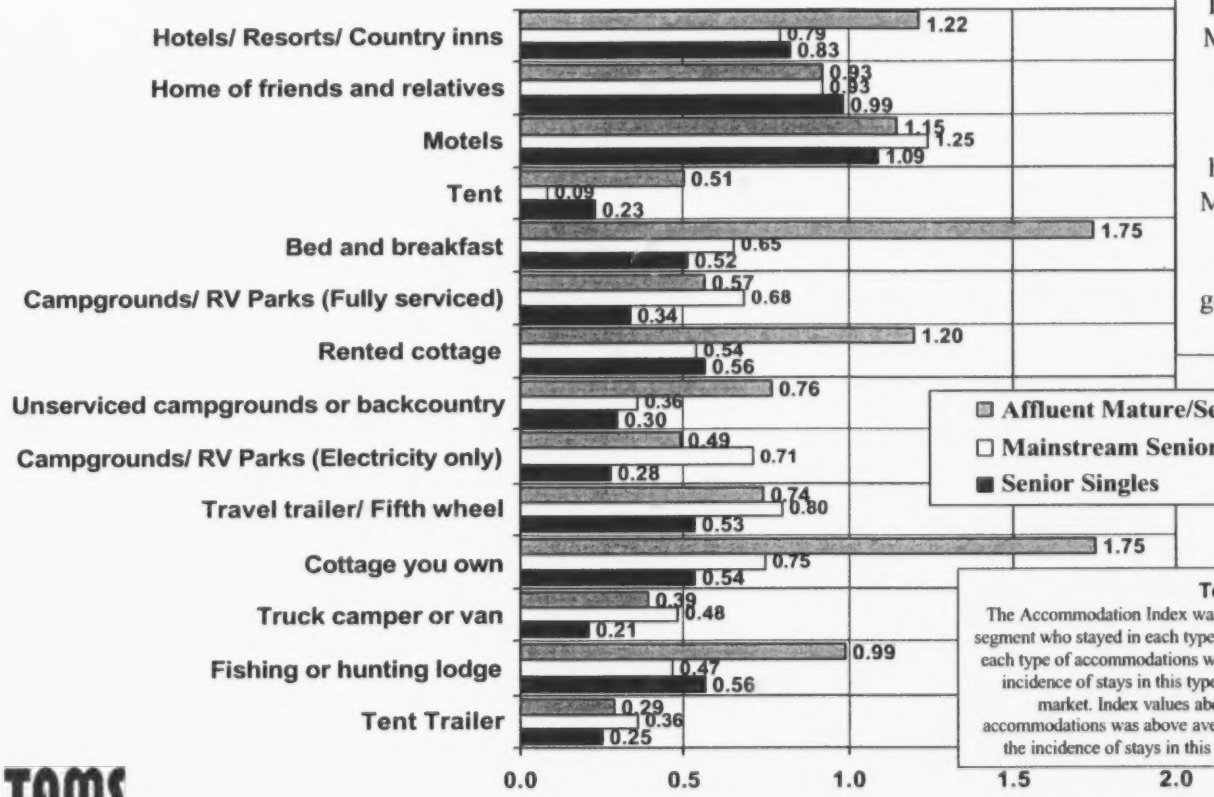
Technical Note

The Accommodation Index was computed by dividing the percent within each segment who stayed in each type of accommodation by the percent who stayed in each type of accommodation within the total market. A score of 1.0 means that incidence of stays in this type of accommodation was the same as the total market. Index values above 1.0 indicate that stays in this type of accommodation was above average while index values below 1.0 indicate that the incidence of stays in this type of accommodation was below average.

Indexing for Accommodations Stayed In: Brief & Longer Vacations

Mature/Senior Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the market, Affluent Mature and Senior Couples were more likely to stay in bed and breakfasts, cottages that they owned and to a certain extent, hotels, resorts and country inns. Mainstream Senior Couples were more likely to have stayed in motels. Senior Singles were generally under-indexed for most types of accommodation.

Technical Note

The Accommodation Index was computed by dividing the percent within each segment who stayed in each type of accommodation by the percent who stayed in each type of accommodations within the total market. A score of 1.0 means that incidence of stays in this type of accommodation was the same as the total market. Index values above 1.0 indicate that stays in this type of accommodations was above average while index values below 1.0 indicate that the incidence of stays in this type of accommodations was below average.

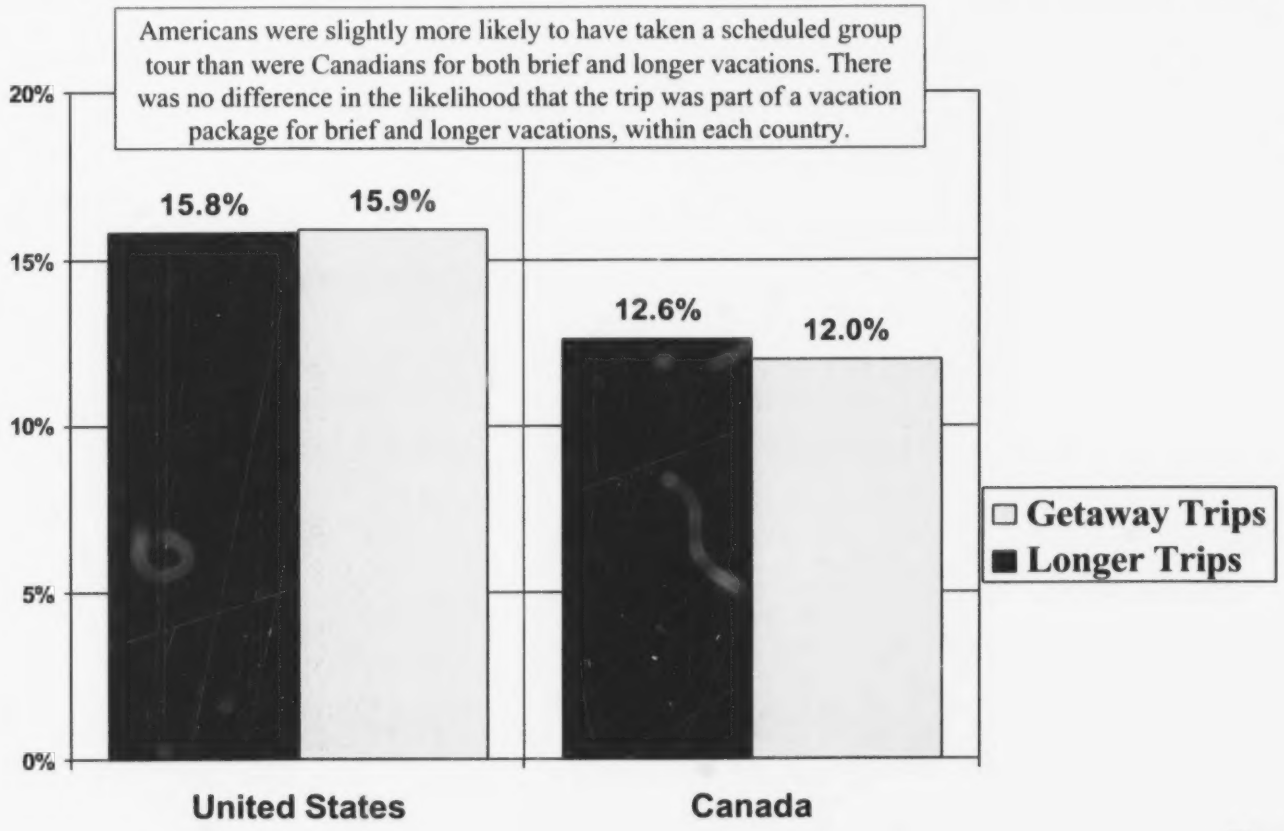
TAMS
Travel Activities & Motivation Survey

Lang RESEARCH

Percent Taking Brief/Long Scheduled Group Tour Vacations

Scheduled Group Tours: Brief versus Long Vacations

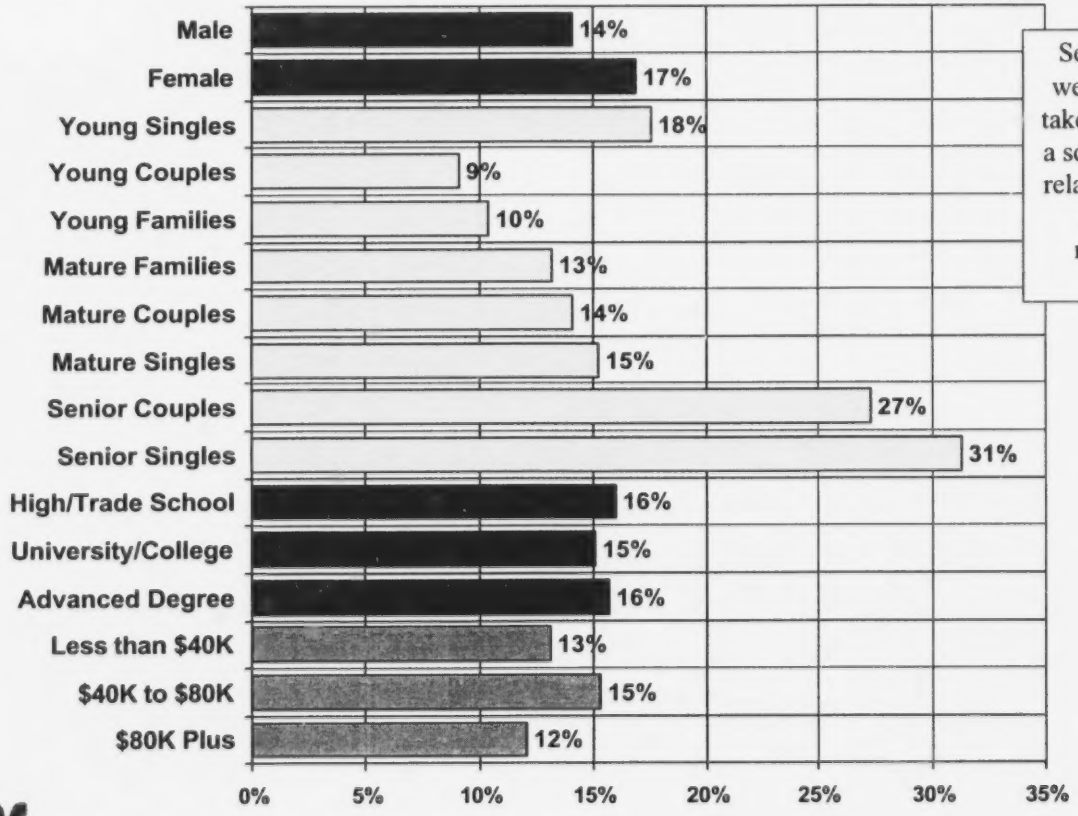
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Percent Taking Brief Scheduled Group Tour Vacations

Brief Scheduled Group Tours

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

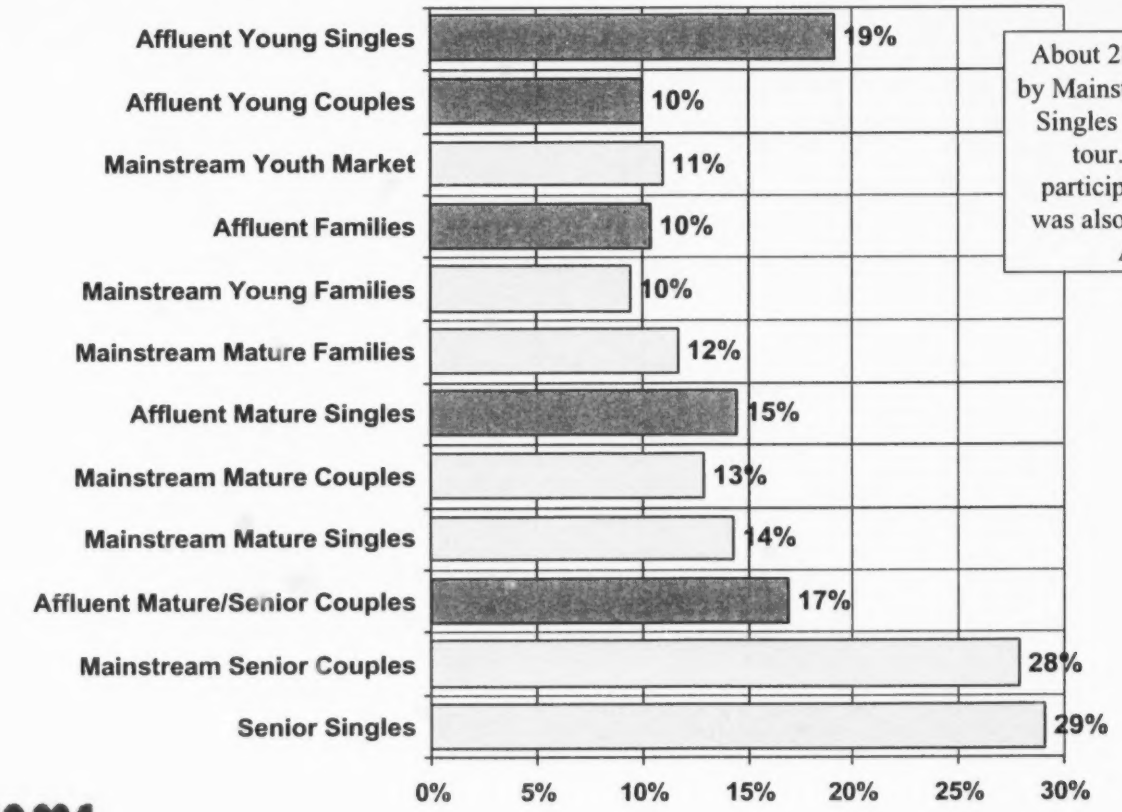


Senior Couples and Senior Singles were clearly the most likely to have taken a brief vacation that was part of a scheduled group tour. There was no relationship between the incidence of scheduled group tours and the respondent's gender ,household income or level of education.

Percent Taking Brief Scheduled Group Tour Vacations

Brief Scheduled Group Tours

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

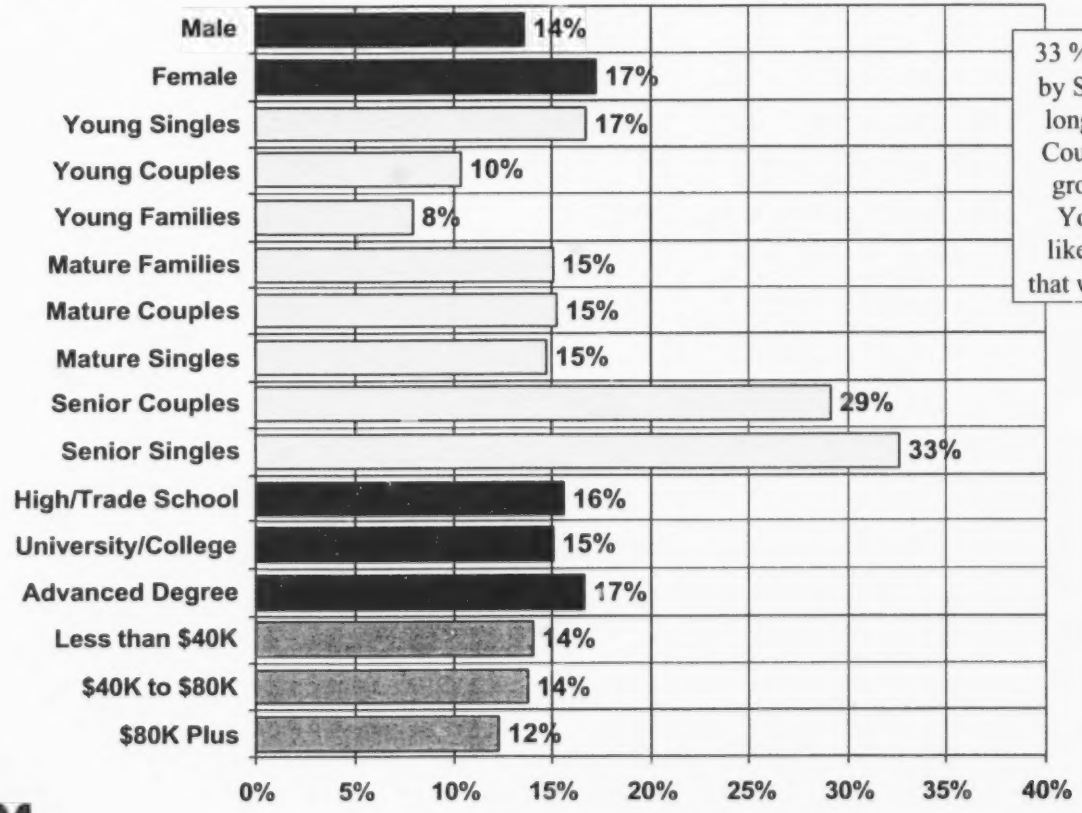


About 28 % of the brief vacations taken by Mainstream Senior Couples and Senior Singles were part of a scheduled group tour. Relative to other segments, participation in scheduled group tours was also slightly more likely among the Affluent Young Singles.

Percent Taking Longer Scheduled Group Tour Vacations

Longer Scheduled Group Tours

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

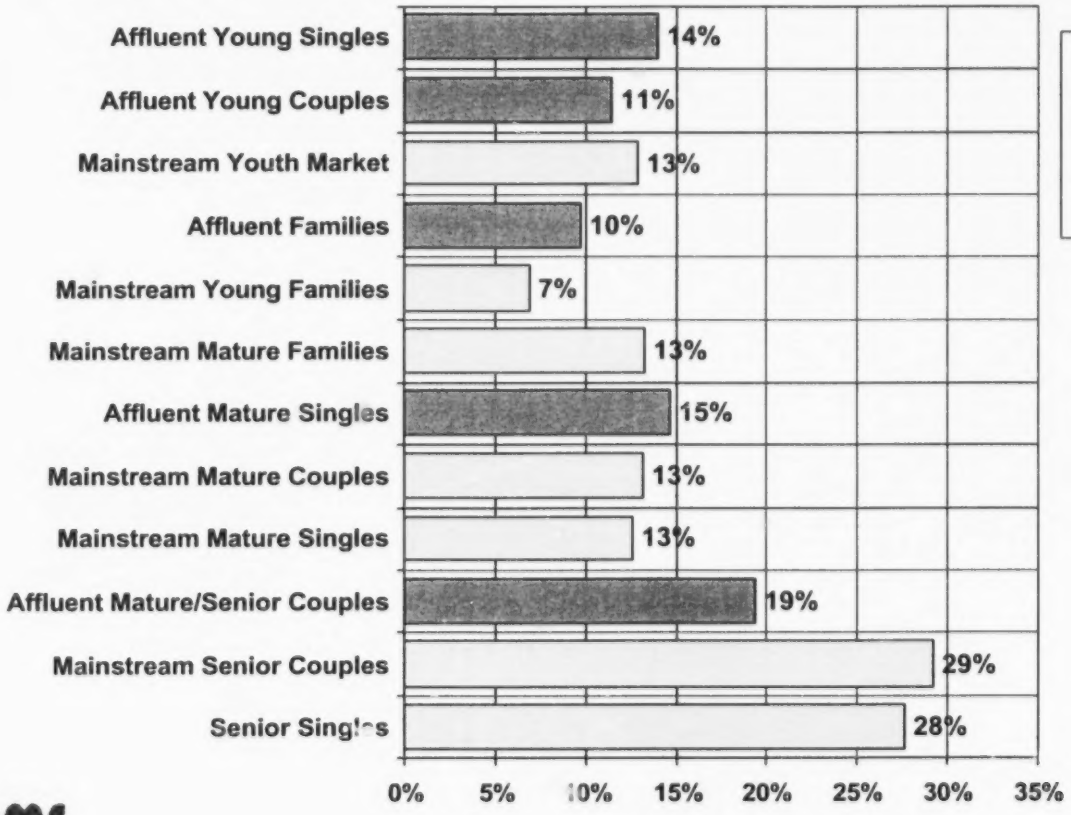


33 % of the longer vacations taken by Senior Singles and 29 % of the longer vacations taken by Senior Couples were part of a scheduled group tour. Young Couples and Young Families were the least likely to have taken a longer trip that was part of a vacation package.

Percent Taking Longer Scheduled Group Tour Vacations

Longer Scheduled Group Tours

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

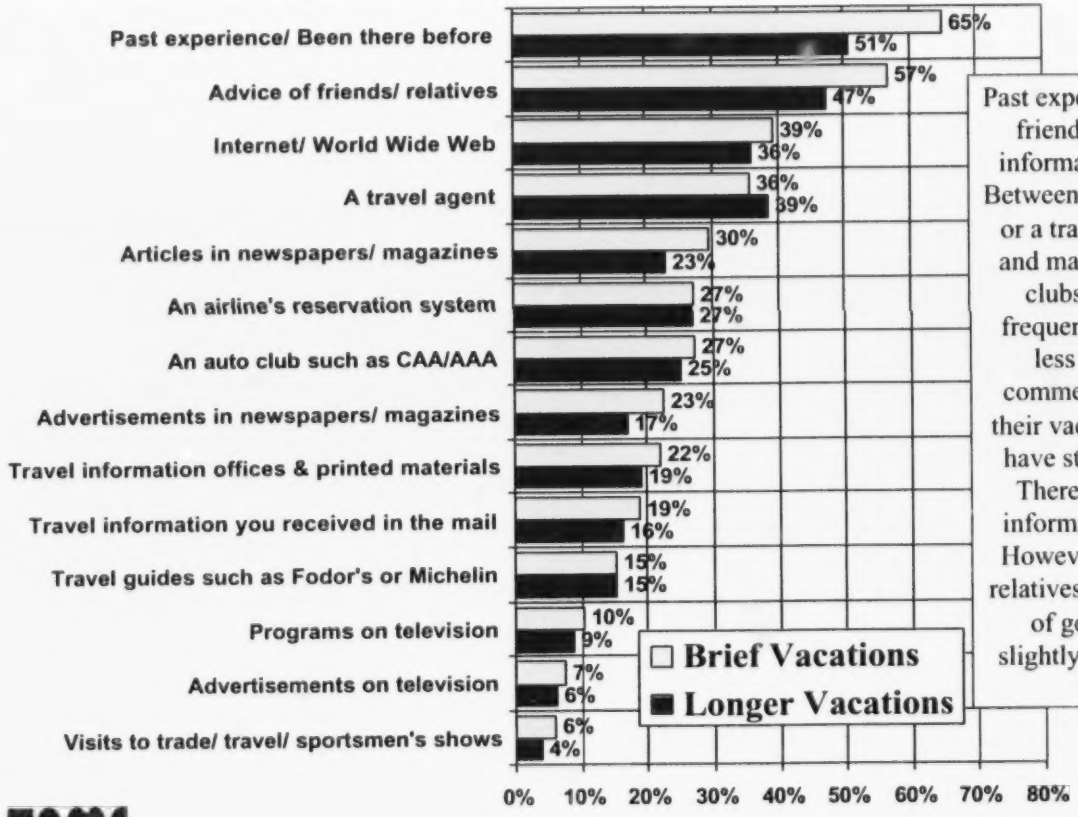


Mainstream Senior Couples and Senior Singles were clearly the most likely to have participated in a scheduled group tour for longer trips. Mainstream Young Families were the least likely to take this sort of longer vacation.

Percent Using Various Information Sources to Plan Vacation

Brief versus Longer Pleasure Trips During Past two years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

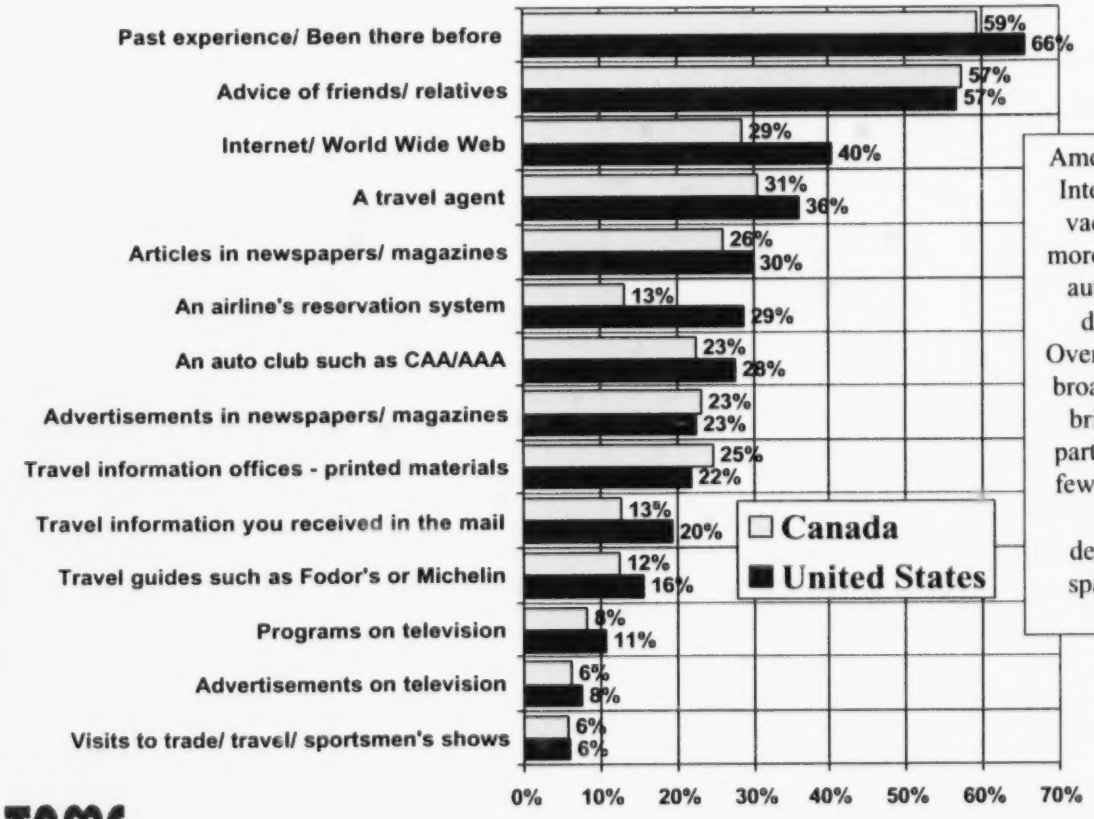


Past experience and the advice of family members and friends were the most frequently used sources of information to plan both brief and longer vacations. Between 36 % and 39 % also report using the Internet or a travel agent to plan their vacations. Newspaper and magazine articles, materials obtained from auto clubs and airline reservation systems were also frequently used to plan vacations. Vacationers were less likely to identify television programs and commercials as sources of information used to plan their vacations (although this sort of information may have stimulated interest in a particular destination). There was remarkable consistency in the types of information used to plan brief and longer vacations. However, past experience and the advice of friends/ relatives played a more prominent role in the planning of getaway vacations, while travel agents were slightly more likely to have been used to plan longer trips.

Percent Using Various Information Sources to Plan Vacation

Brief Vacations: Canada versus United States

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

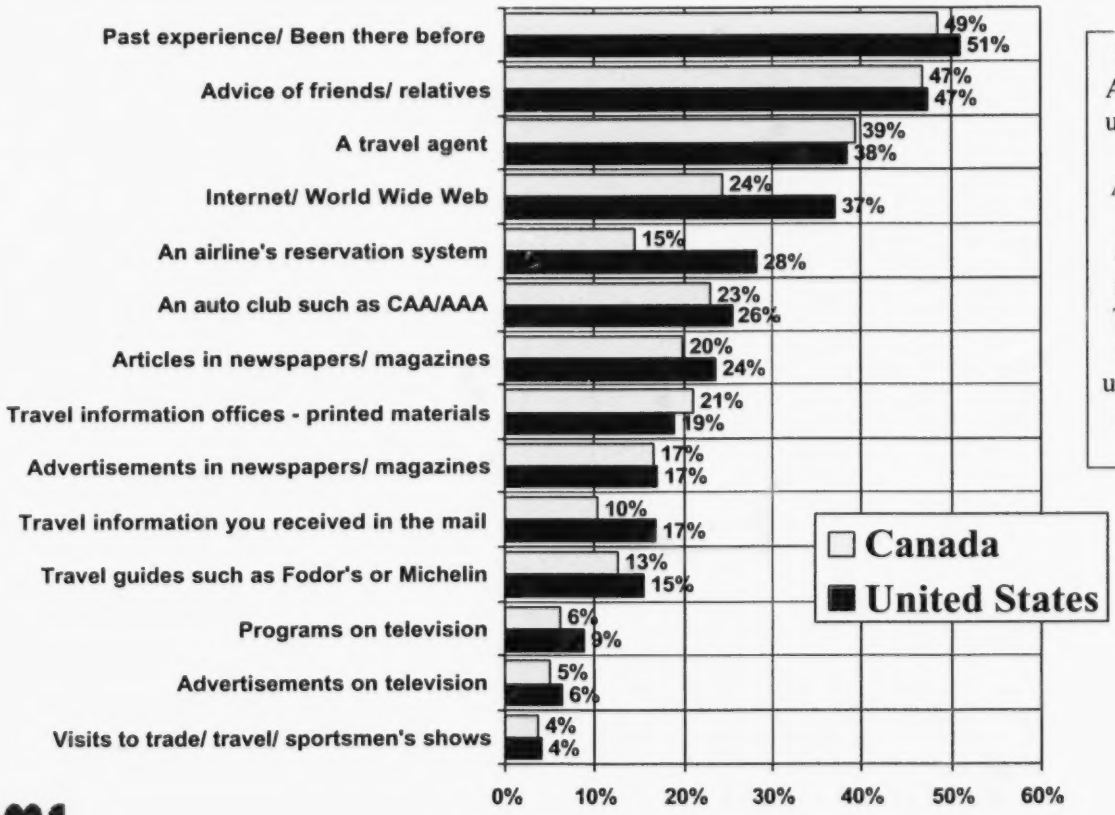


Americans were more likely to have used the Internet and travel agents to plan their brief vacations than Canadians. They were also more likely to have used information from an auto club, an airline reservation system or direct mail to help plan brief vacations. Overall, it would appear that Americans use a broader range of information sources to plan brief vacations than Canadians. This may partially reflect the fact that Canadians have fewer destination options for brief vacations (because there are fewer short-haul destinations available to travel to in more sparsely populated Canada, relative to the U.S..

Percent Using Various Information Sources to Plan Vacation

Longer Vacations: Canada versus United States

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

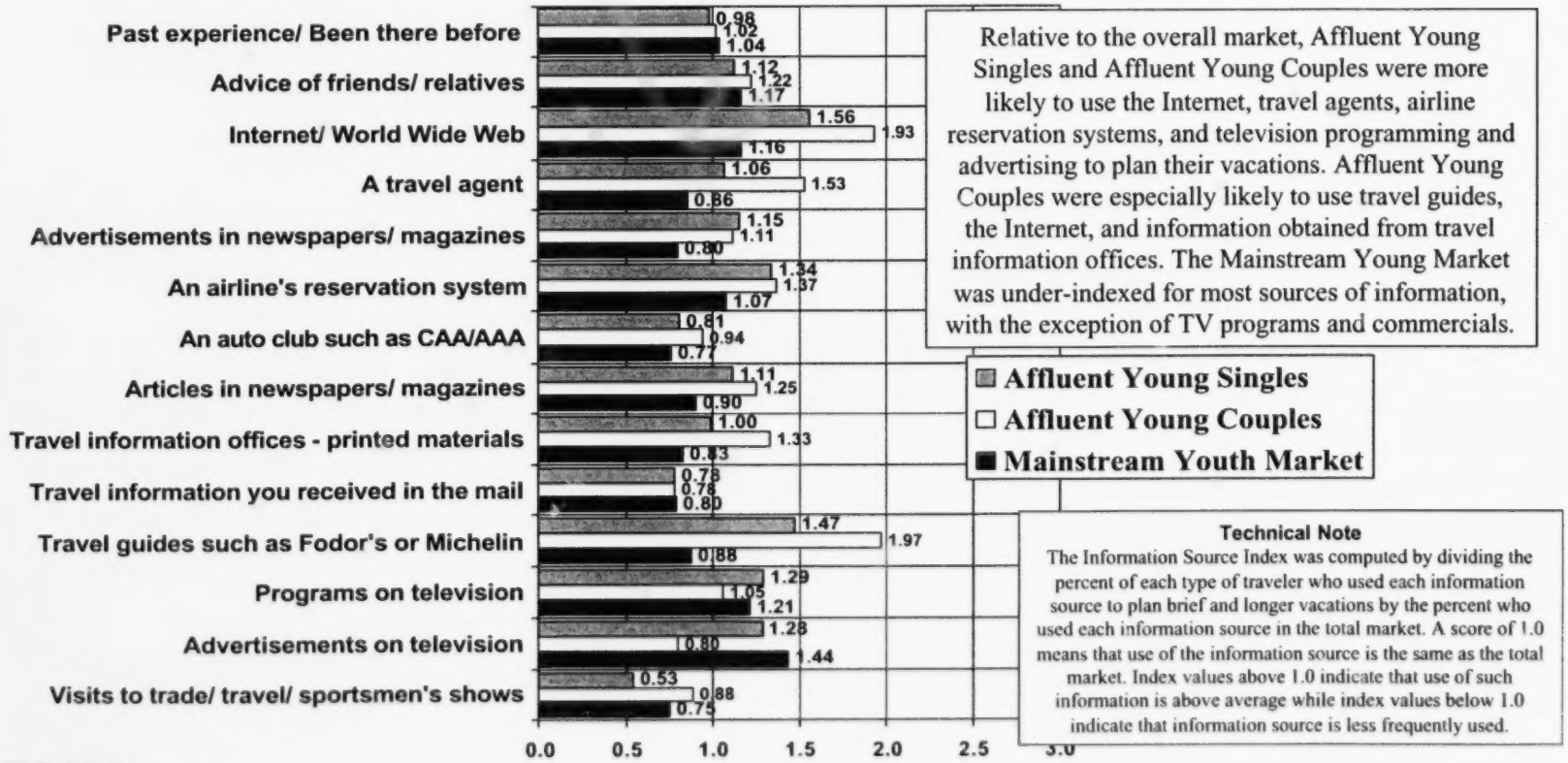


Similar to brief vacation planning, Americans were more likely to have used the Internet to plan their longer vacations than were Canadians. Americans were also more likely to have used information from an airline reservation system or direct mail to help plan longer vacations. There was little difference between Canadians and Americans in their use of travel agents, auto clubs or the advice of family and friends when planning longer vacations.

Indexing for Information Used To Plan Vacations: Brief & Longer Vacations

Young Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the overall market, Affluent Young Singles and Affluent Young Couples were more likely to use the Internet, travel agents, airline reservation systems, and television programming and advertising to plan their vacations. Affluent Young Couples were especially likely to use travel guides, the Internet, and information obtained from travel information offices. The Mainstream Young Market was under-indexed for most sources of information, with the exception of TV programs and commercials.

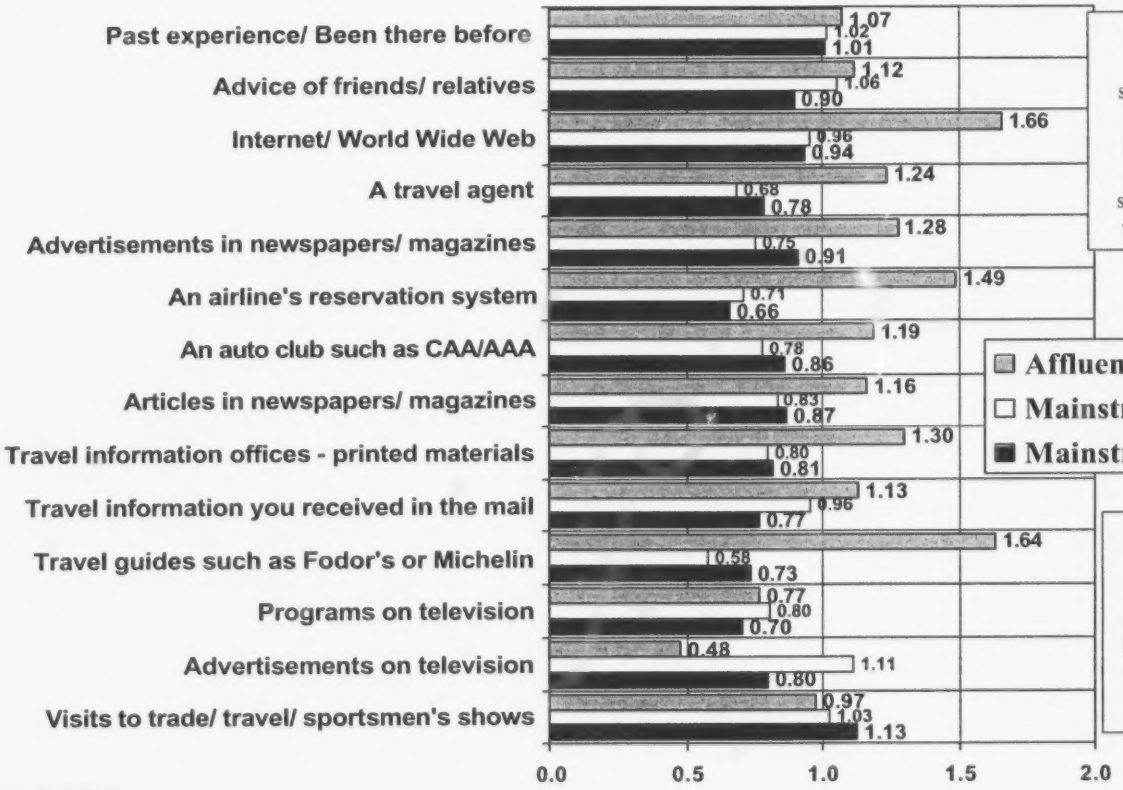
Technical Note

The Information Source Index was computed by dividing the percent of each type of traveler who used each information source to plan brief and longer vacations by the percent who used each information source in the total market. A score of 1.0 means that use of the information source is the same as the total market. Index values above 1.0 indicate that use of such information is above average while index values below 1.0 indicate that information source is less frequently used.

Indexing for Information Used To Plan Vacations: Brief & Longer Vacations

Family Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Affluent Families were more likely to use the Internet, travel agents, airline reservation systems, print media, travel information offices and travel guides to plan their vacations. The Mainstream Young and Mature Families were generally under-indexed for most information sources. However, Mainstream Young Families were over-indexed for television commercials.

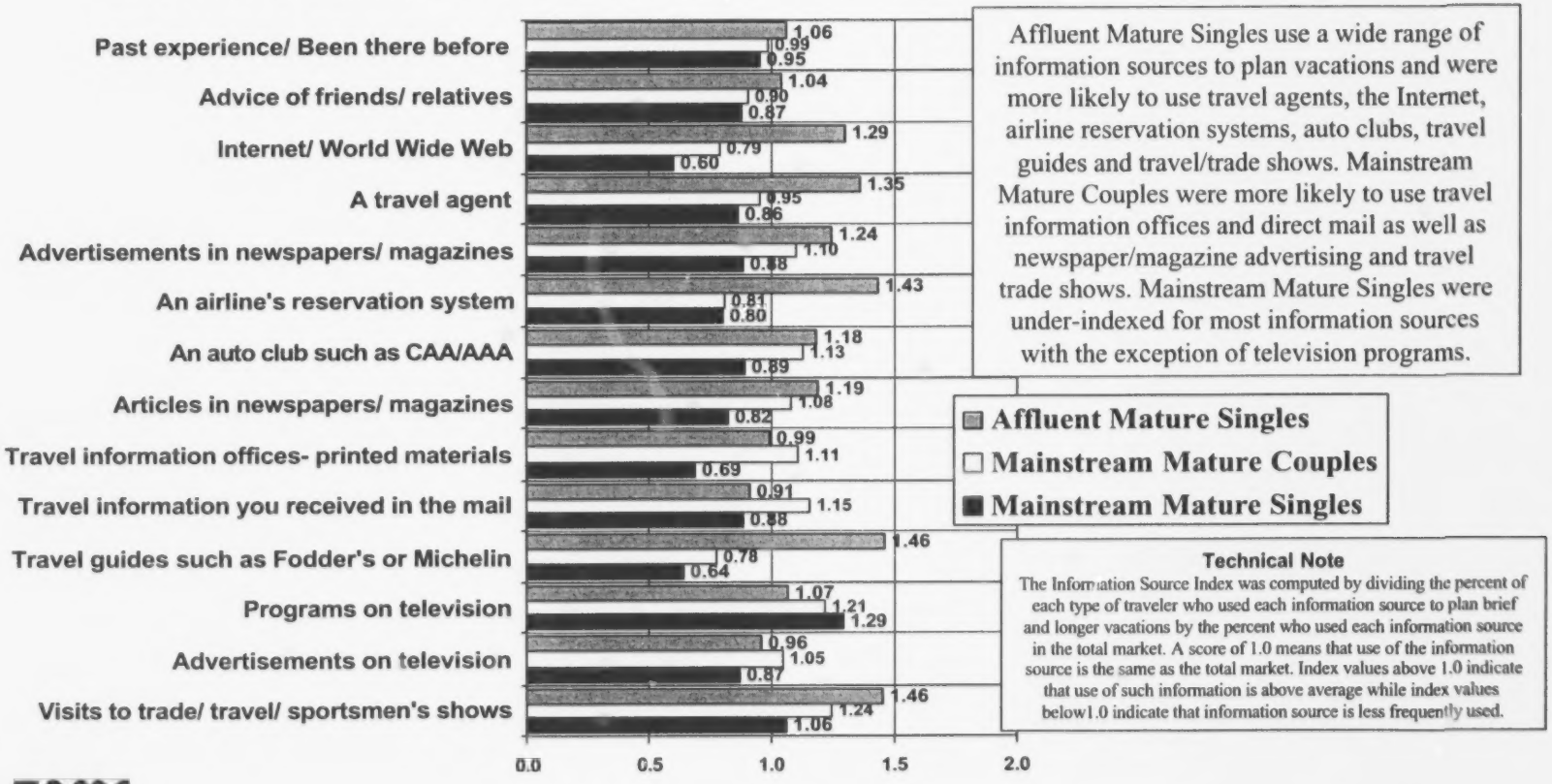
Technical Note

The Information Source Index was computed by dividing the percent of each type of traveler who used each information source to plan brief and longer vacations by the percent who used each information source in the total market. A score of 1.0 means that use of the information source is the same as the total market. Index values above 1.0 indicate that use of such information is above average while index values below 1.0 indicate that information source is less frequently used.

Indexing for Information Used To Plan Vacations: Brief & Longer Vacations

Mature Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Affluent Mature Singles use a wide range of information sources to plan vacations and were more likely to use travel agents, the Internet, airline reservation systems, auto clubs, travel guides and travel/trade shows. Mainstream Mature Couples were more likely to use travel information offices and direct mail as well as newspaper/magazine advertising and travel trade shows. Mainstream Mature Singles were under-indexed for most information sources with the exception of television programs.

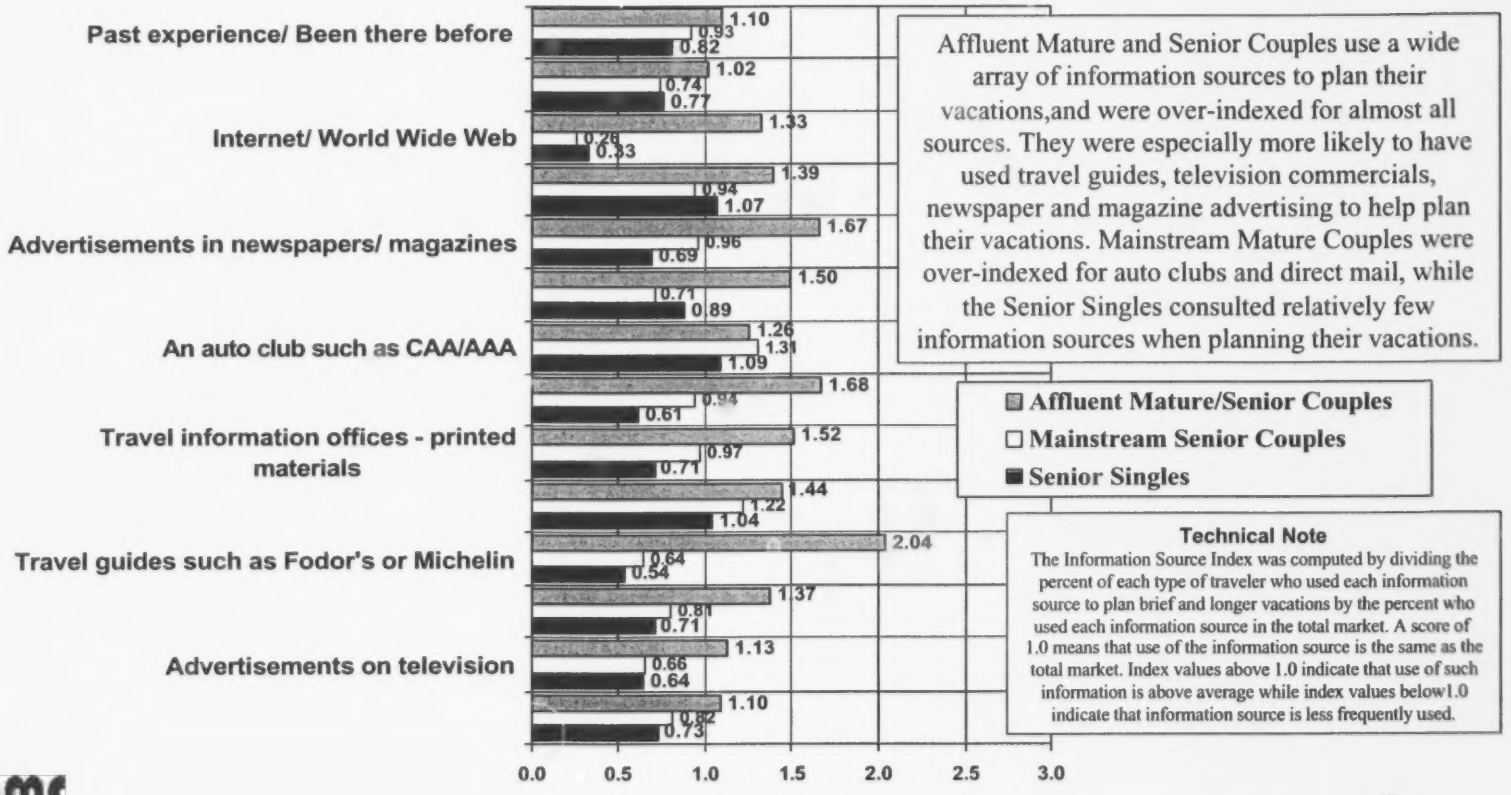
Technical Note

The Information Source Index was computed by dividing the percent of each type of traveler who used each information source to plan brief and longer vacations by the percent who used each information source in the total market. A score of 1.0 means that use of the information source is the same as the total market. Index values above 1.0 indicate that use of such information is above average while index values below1.0 indicate that information source is less frequently used.

Indexing for Information Used To Plan Vacations: Brief & Longer Vacations

Mature/Senior Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Section Eighteen

Use of Vacation Packages in Pleasure Travel

Use of Vacation Packages in Pleasure Travel

- Research Method -

27 % of those who took a brief vacation and 32 % of those who took a longer vacation during the past two years reported having purchased vacation packages at least sometimes.

Senior Singles were the most likely to have purchased a vacation package. Mainstream Senior Couples, Mainstream Mature Couples, Mainstream Mature Singles, and Affluent Mature and Senior Couples were also more likely than other segments to have purchased brief vacation packages. These mature and senior segments represent prime markets for brief vacation packages.

In terms of longer (4 plus day) vacations, Affluent Young Couples, Affluent Families, Affluent Mature and Senior Couples, and Senior Singles were the most likely to have purchased a vacation package within the last two years.

The most frequently purchased types of vacation packages were for resorts or cruises. Americans were 25 % more likely than Canadians to have purchased a resort or cruise vacation package during the past two years. On the other hand, Canadians were more likely than Americans to have purchased adventure packages, city packages and educational packages.

The types of vacation packages purchased varied widely across the market, reflecting the differences in the types of vacation experiences sought by various market segments. For example, the Youth segments were more likely to purchase adventure packages and ski packages; Affluent Families were more likely to purchase ski packages, resort or cruise packages and educational package; while Affluent Mature and Senior Couples were more likely to purchase resort and cruise packages, adventure packages and city packages. On the other hand, Mainstream Senior Couples and Senior Singles were more likely to purchase motorcoach tour packages and theatre packages. The wide variation in vacation interests across the market segments indicates that a strategic approach will be required to effectively promote particular types of vacation packages.

Use of Vacation Packages in Pleasure Travel

- Research Method -

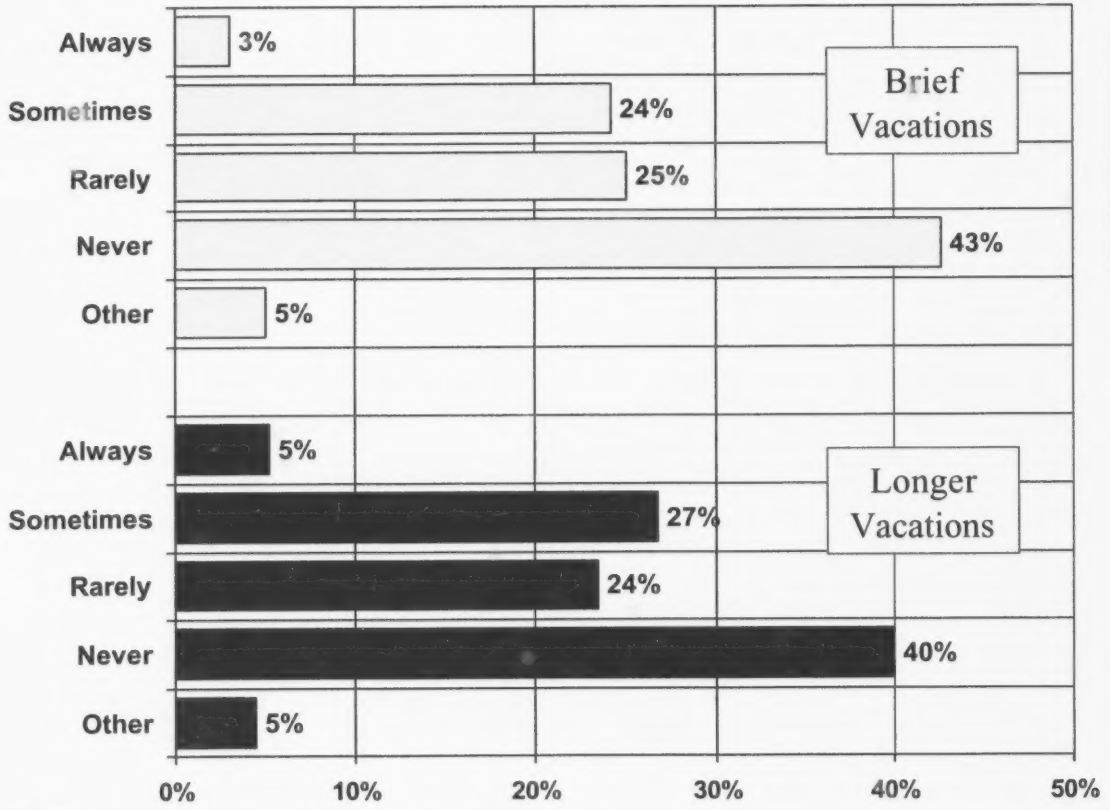
In the mailback survey, respondents were given the following description of vacation package deals:

> *Package deals are special prices offered for more than one type of travel service. They may include:*
>
> - *Transportation to the destination*
> - *Transportation at the destination*
> - *Vehicle rental*
> - *Accommodation*
> - *Food/Meals (etc.)*
> - *Entertainment*

Those who had taken trips were asked whether they always, sometimes, rarely or never use vacation package deals. Separate questions were asked for brief and longer trips.

Percent Using Packages for Brief & Long Trips

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

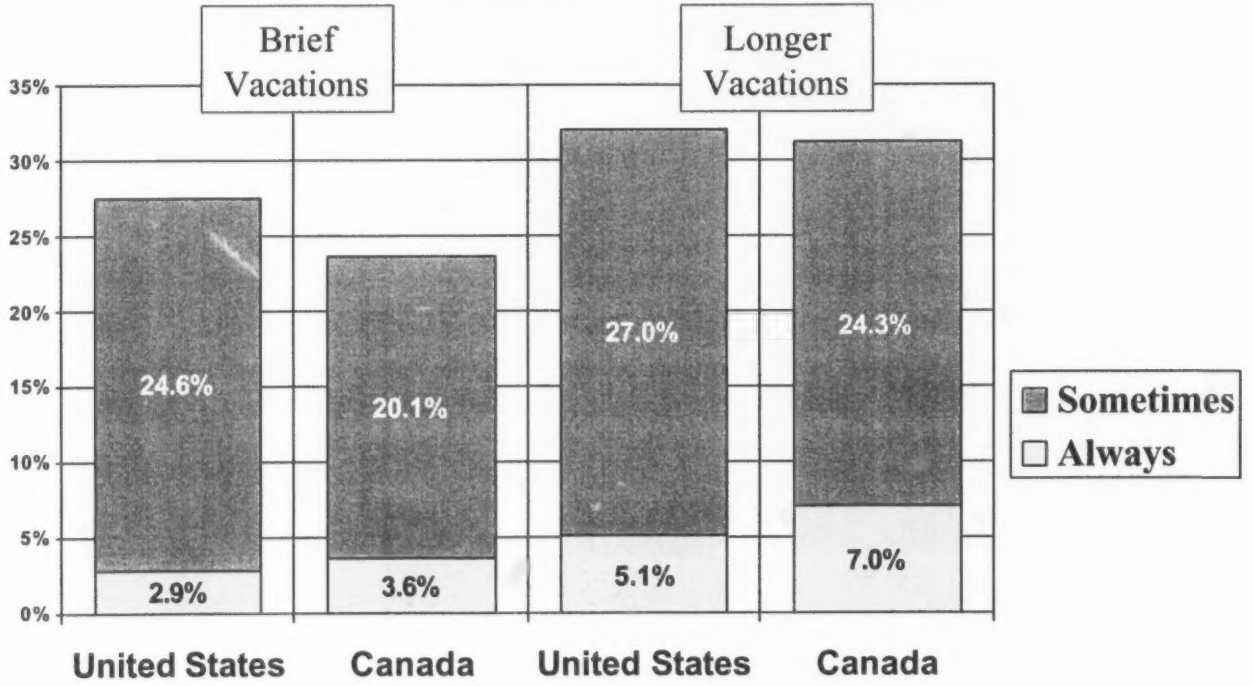


27 % of the those who had taken a brief vacation in the last two years reported using a vacation package, sometimes or always. 32 % use vacation packages for longer vacations, sometimes or always.

Percent Using Packages for Brief & Long Trips

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

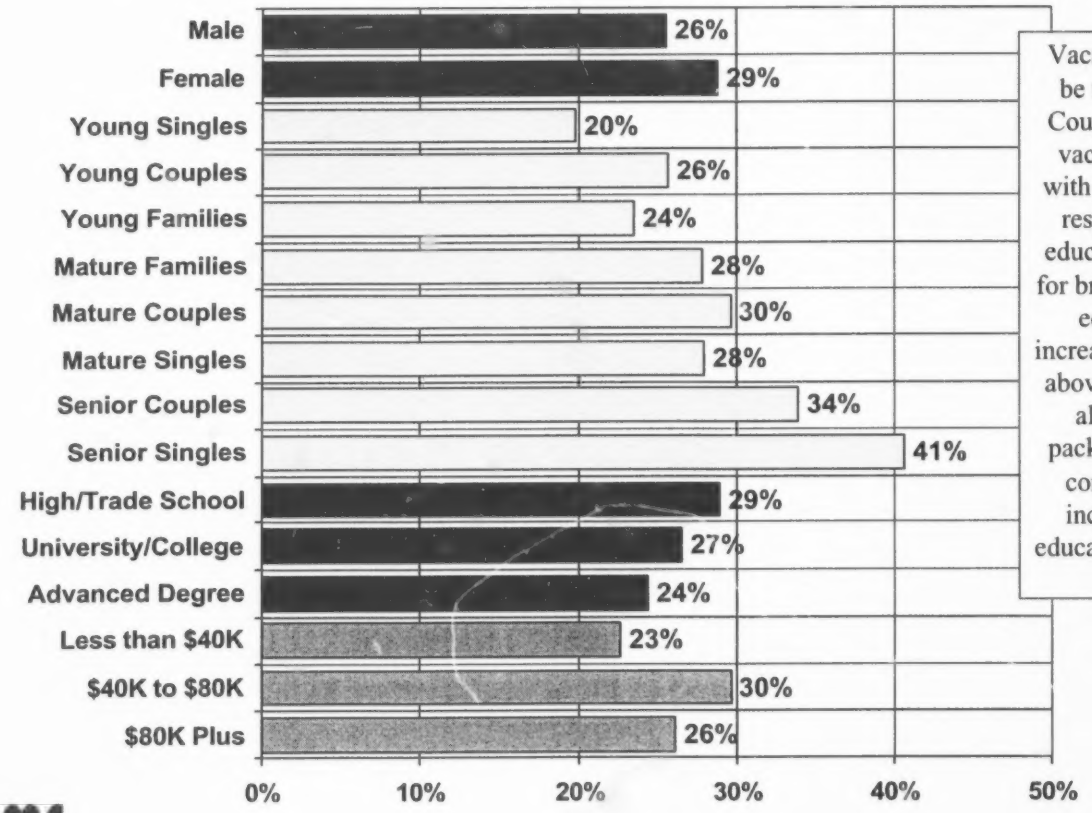
Americans (27.5 %) were slightly more likely than Canadians (24.8 %) to always or sometims use vacation packages when taking a brief trip. There was no difference between Canada and the United States in the likelihood that a longer trip was a vacation package.



Percent Using Packages Always/Sometimes

Brief Trips

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

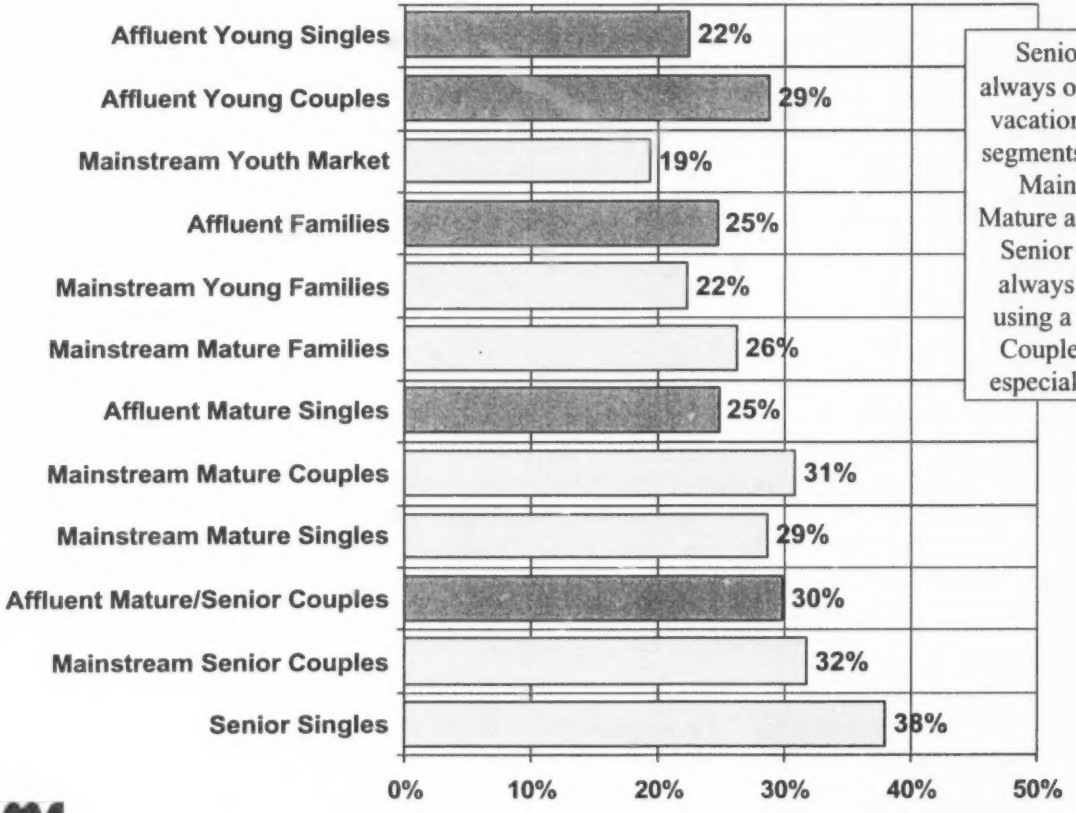


Vacation packages were more likely to be used by Senior Singles and senior Couples for brief vacations. The use of vacation packages tended to increase with the age of the respondent. As older respondents tend to have less formal education, the use of vacation packages for brief vacations tends to decline as the education level of the respondent increases. Those with household incomes above $40,000 were also more likely to always or sometimes use vacation packages for brief pleasure travel. This combination suggests that moderate income households with less formal education may be prime markets for brief vacation packages.

Percent Using Packages Always/Sometimes

Brief Trips

Base: Total Population (18 Plus) Who Took a Brief Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

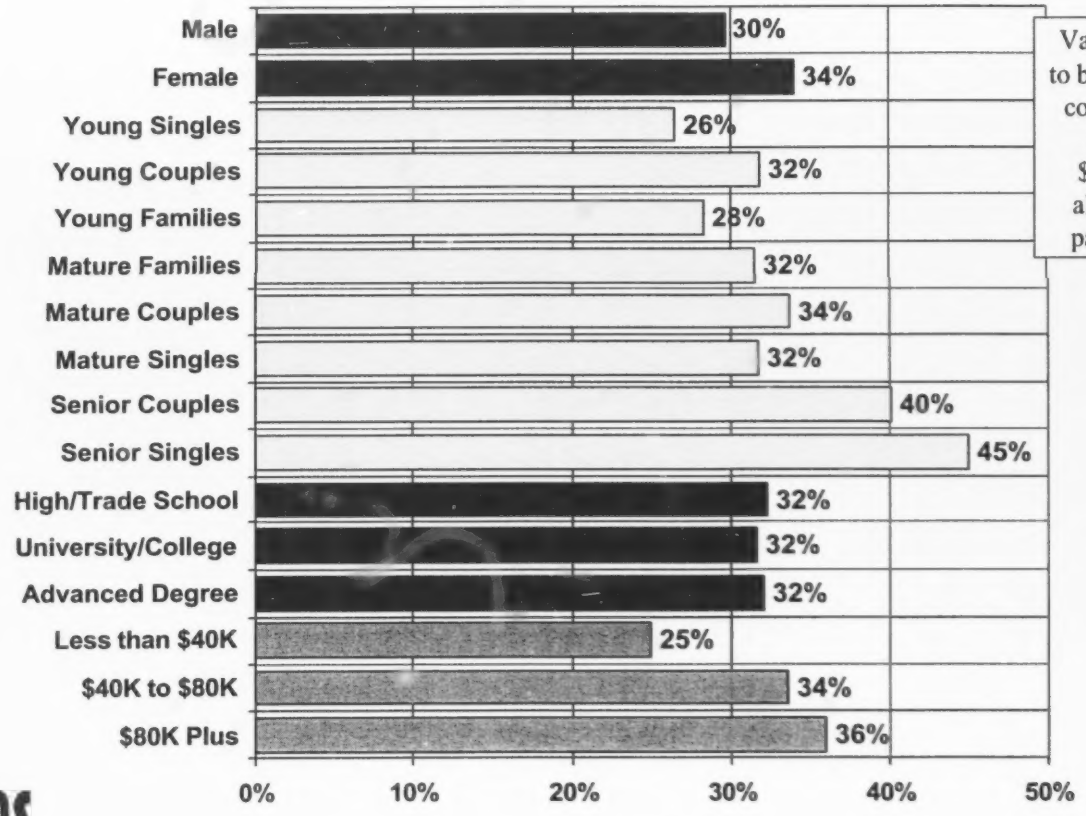


Senior Singles were the most likely to always or sometimes take a brief trip using a vacation package. Other senior and mature segments (i.e., Mainstream Mature Couples, Mainstream Mature Singles, Affluent Mature and Senior Couples, and Mainstream Senior Couples) were also more likely to always or sometimes take brief vacations using a vacation package. Affluent Young Couples are also vacation package users, especially relative to their same-age peers.

Percent Using Packages Always/Sometimes

Longer Trips

Base:Adult Population (18 Plus): Those Taking Longer Trips During Past Two Years: Canada and U.S.

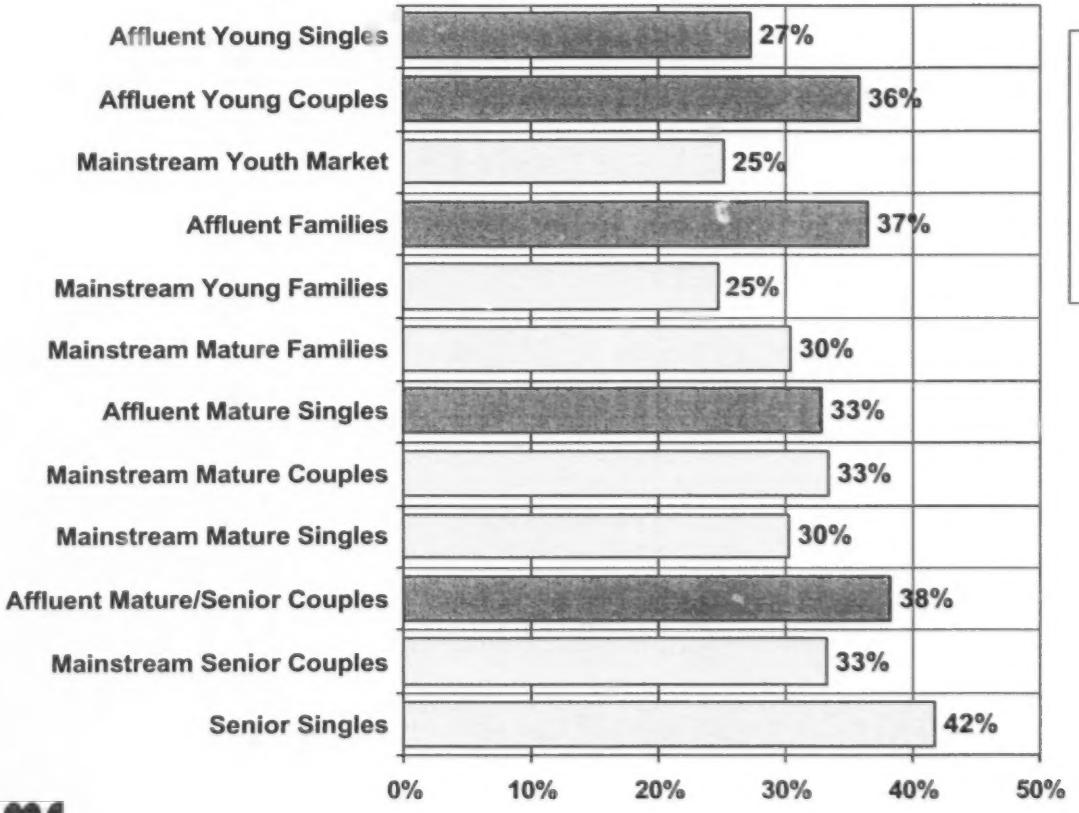


Vacation packages were more likely to be used by senior singles and senior couples for longer vacations. Those with household incomes above $40,000 were also more likely to always or sometimes use vacation packages for longer pleasure trips.

Percent Using Packages Always/Sometimes

Longer Trips

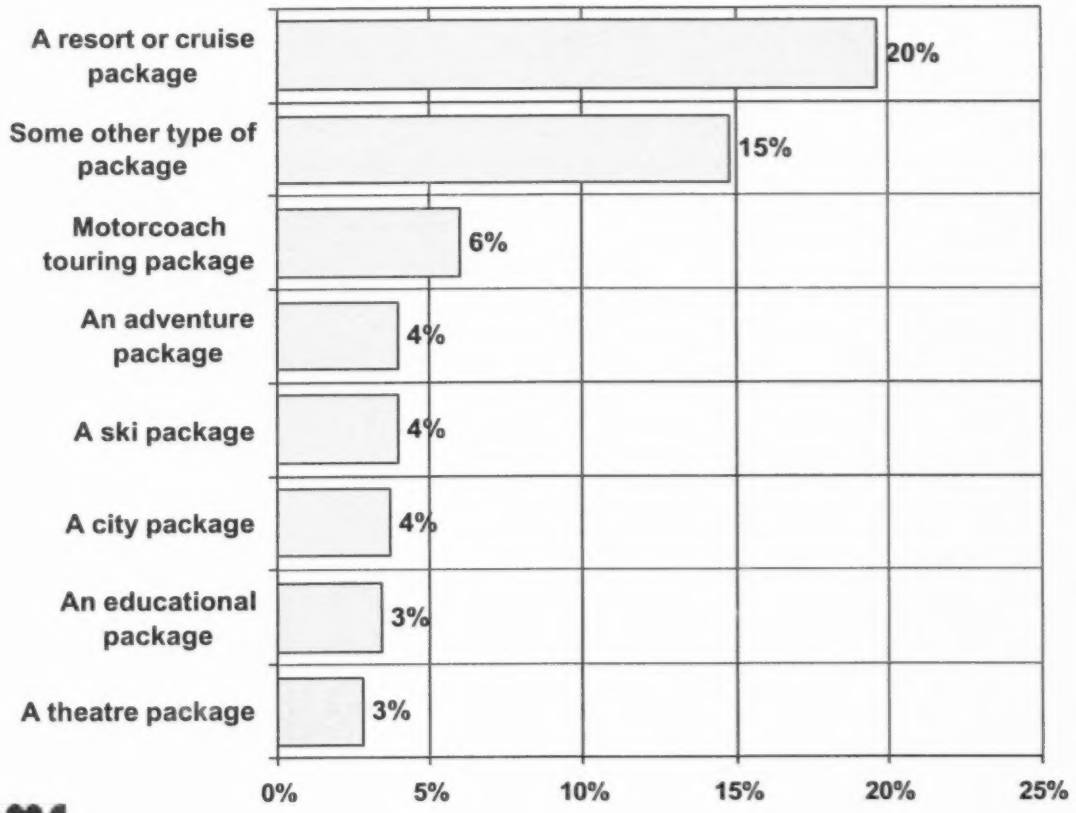
Base:Adult Population (18 Plus): Those Taking Longer Trips During Past Two Years: Canada and U.S.



Vacation packages for longer trips were most often used by Senior Singles, Affluent Mature and Senior Couples, Affluent Families and Affluent Young Couples. The Mainstream Youth Market and Mainstream Young Families were less frequent users of vacation packages.

Types of Vacation Packages

Base:Adult Population (18 Plus): Those Taking Trips During Past Two Years: Canada and U.S.

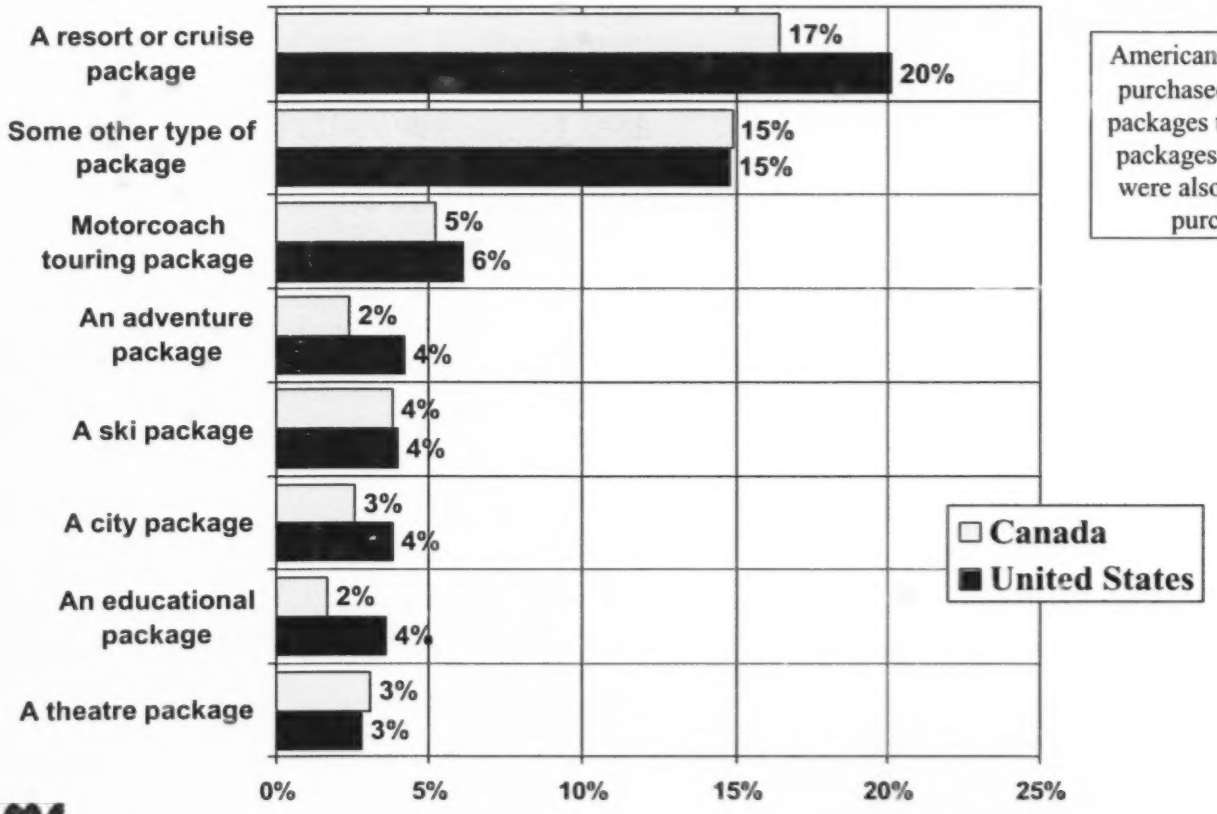


The most frequently purchased vacation packages were for resorts or cruises. Other types of packages were purchased by between 3 % and 6 % of the travelers.

Types of Vacation Packages

Canada versus United States

Base:Adult Population (18 Plus): Those Taking Trips During Past Two Years: Canada vs. U.S.

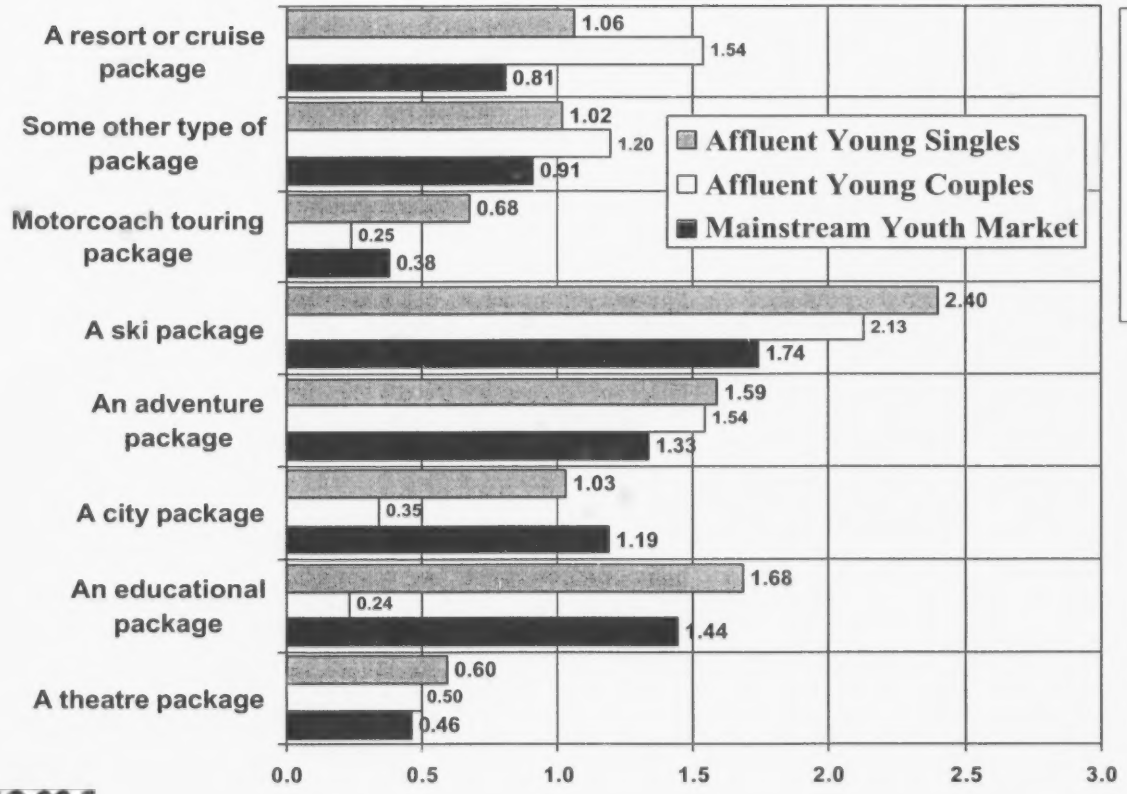


Americans were more likely to have purchased resort or cruise vacation packages than Canadians. Adventure packages and educational packages were also more likely to have been purchased by Americans.

Indexing for Vacation Packages: Brief & Longer Vacations

Young Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



The three youth segments were more likely to have purchased adventure packages and ski packages. Affluent Young Singles and the Mainstream Youth Market were also over-indexed for educational packages. Affluent Young Couples were over-indexed for Resort or Cruise vacation packages.

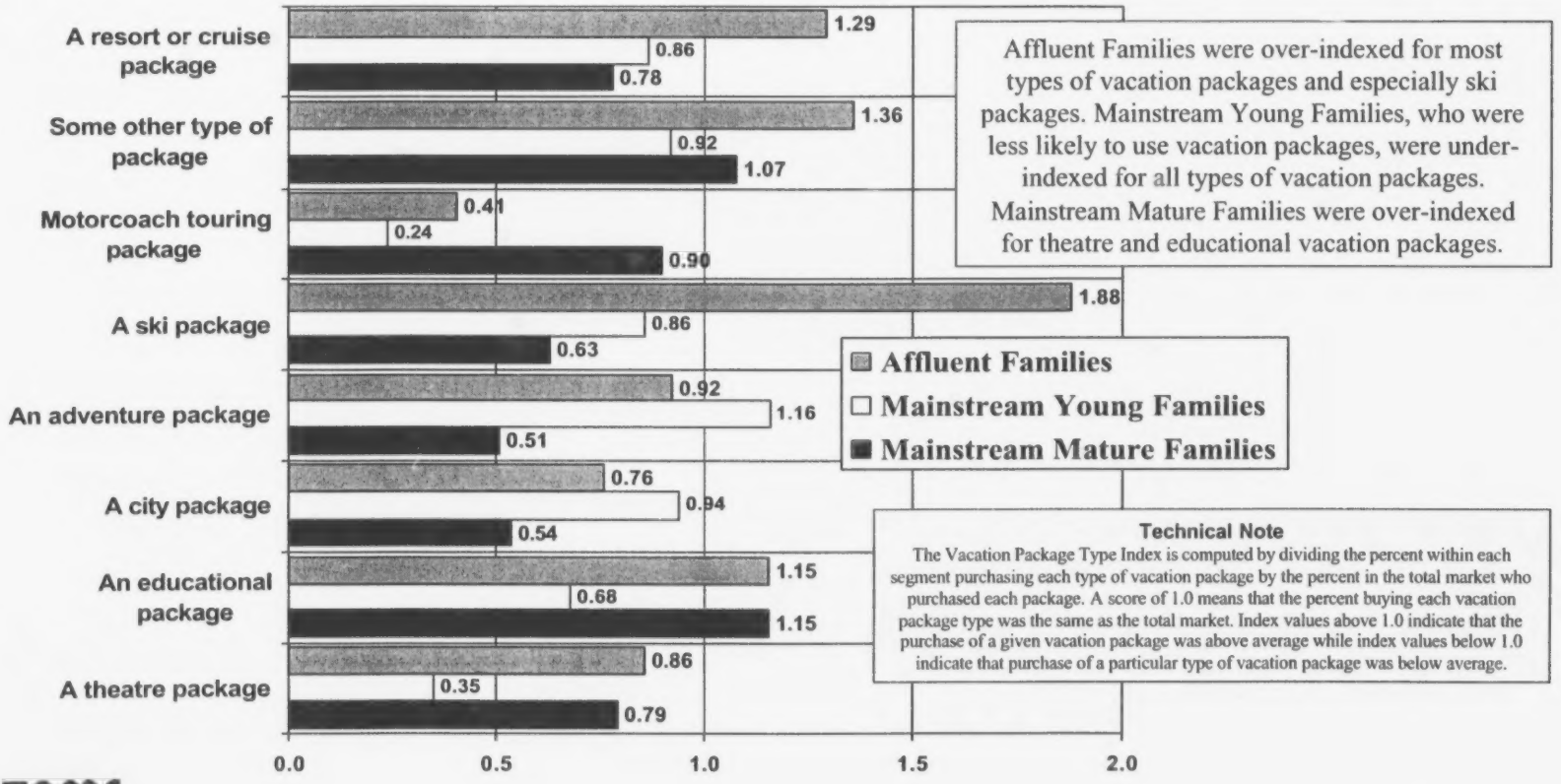
Technical Note

The Vacation Package Type Index is computed by dividing the percent within each segment purchasing each type of vacation package by the percent in the total market who purchased each package. A score of 1.0 means that the percent buying each vacation package type was the same as the total market. Index values above 1.0 indicate that the purchase of a given vacation package was above average while index values below 1.0 indicate that purchase of a particular type of vacation package was below average.

Indexing for Vacation Packages: Brief & Longer Vacations

Family Segments

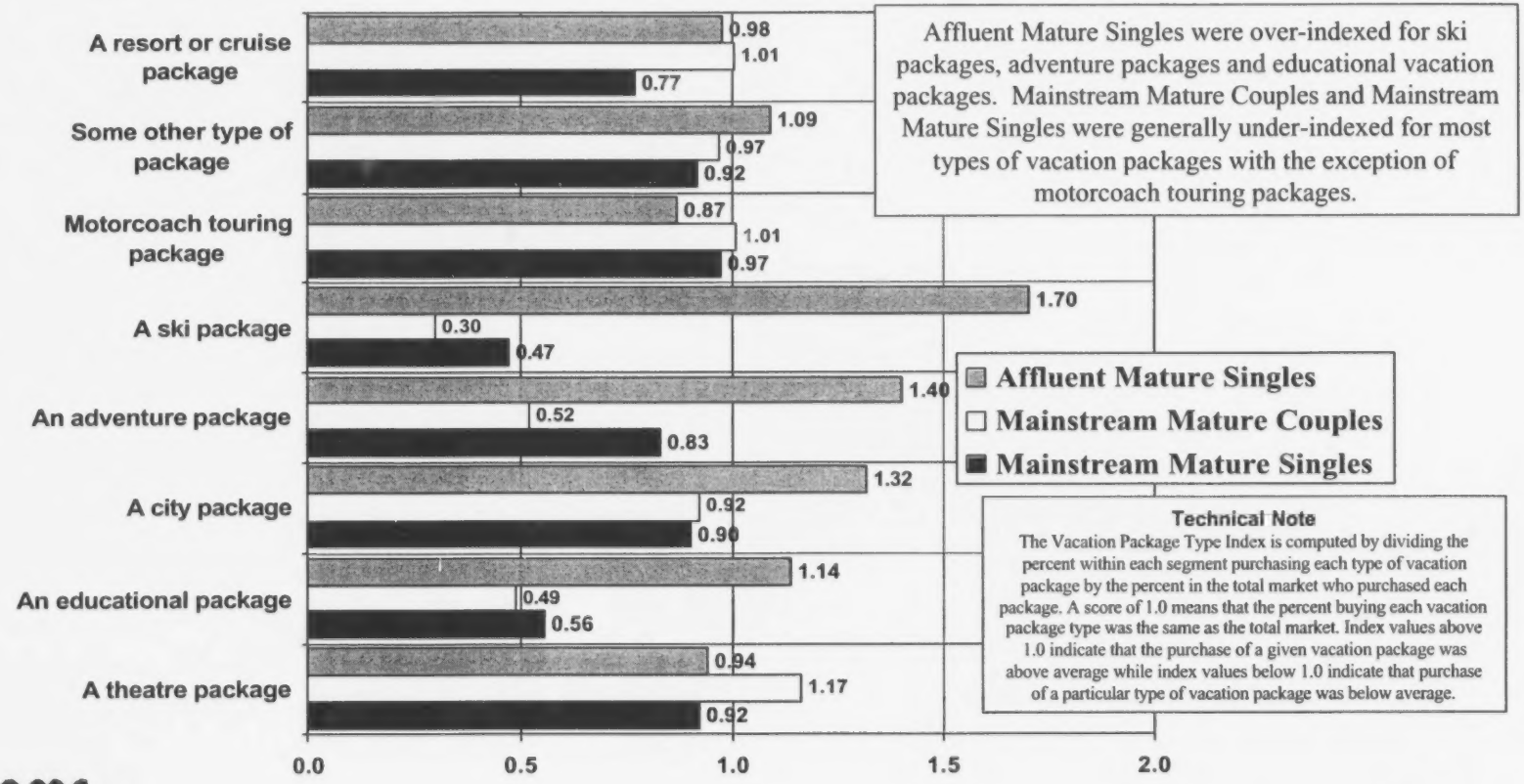
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Indexing for Vacation Packages: Brief & Longer Vacations

Mature Segments

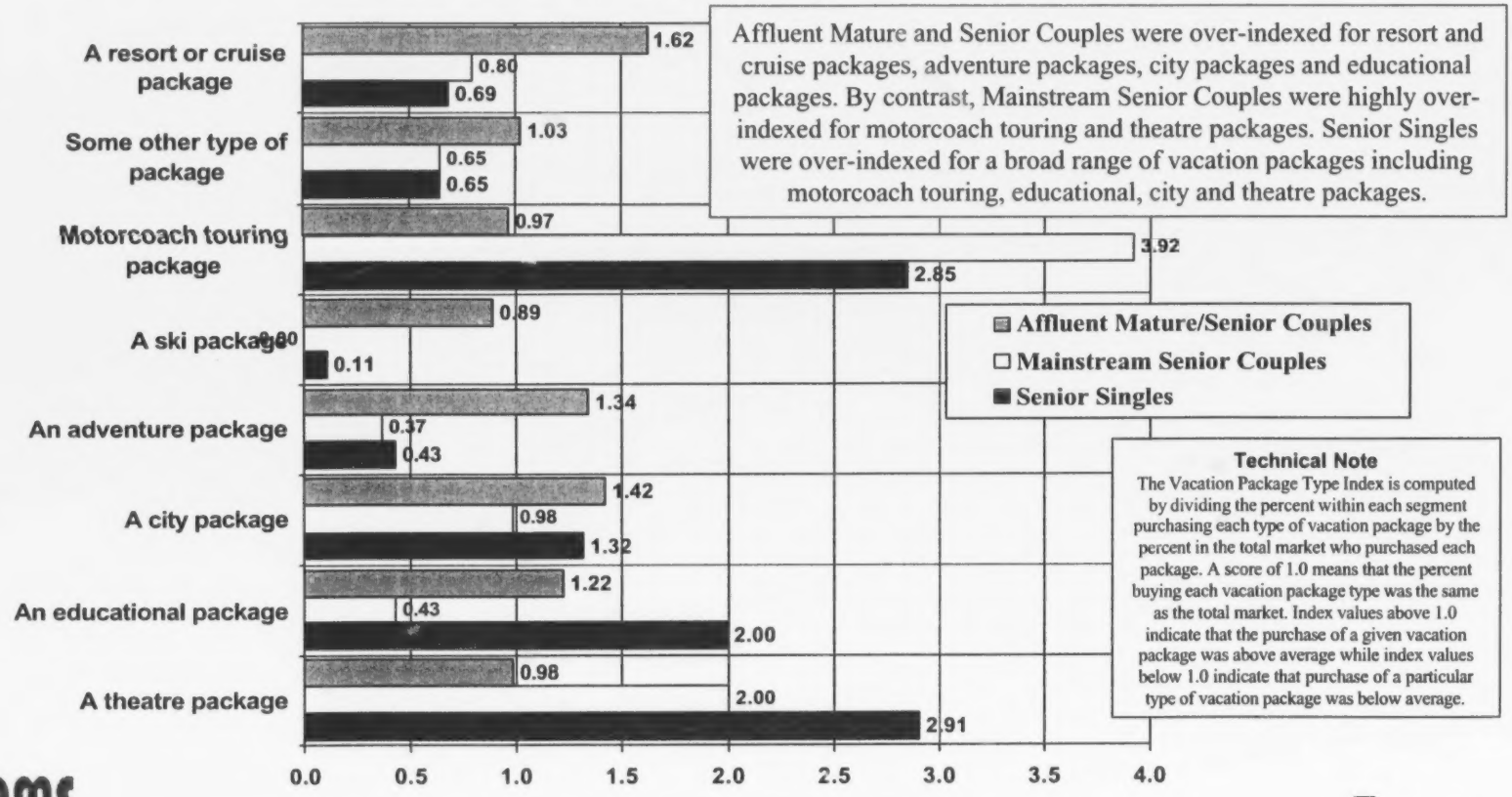
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Indexing for Vacation Packages: Brief & Longer Vacations

Mature/Senior Segments

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Affluent Mature and Senior Couples were over-indexed for resort and cruise packages, adventure packages, city packages and educational packages. By contrast, Mainstream Senior Couples were highly over-indexed for motorcoach touring and theatre packages. Senior Singles were over-indexed for a broad range of vacation packages including motorcoach touring, educational, city and theatre packages.

Technical Note

The Vacation Package Type Index is computed by dividing the percent within each segment purchasing each type of vacation package by the percent in the total market who purchased each package. A score of 1.0 means that the percent buying each vacation package type was the same as the total market. Index values above 1.0 indicate that the purchase of a given vacation package was above average while index values below 1.0 indicate that purchase of a particular type of vacation package was below average.

Section Nineteen

Impressions of Canada

Impressions of Canada

- Key Findings -

As a vacation destination, Canada is better known as a place with natural richness that offers ample opportunities to experience nature and participate in outdoor activities, than as a place which offers culture and entertainment. Thus, Canada receives its highest image ratings as a place with beautiful scenery that is great for fishing and hunting, and a great place to get away from it all. It is also perceived as a place that respects the natural environment, is safe for tourists and has friendly people.

Americans (relative to Canadians) were especially likely to view Canada as a nature-oriented travel destination. However, Americans who had traveled to Canada in the last two years were more likely to perceive Canada as a destination which offered some opportunities to experience culture and entertainment.

Among Americans, Canada's image was strongest among those who were older, with less education and among lower income households. In fact, the Affluent Young Singles, Affluent Young Couples and Affluent Families have the least positive impression of Canada as a vacation destination. As such, some of the segments which are among the most likely to travel tend to have the least positive image of Canada.

There is less variation in Canada's vacation destination imagery among Canadians. However, Canadian Affluent Young Couples were observed to have a relatively weak impression of Canada as a destination that offers opportunities to experience culture and entertainment. While a relatively small segment, the Affluent Young Couples are nevertheless frequent long-haul and international vacationers who may be discounting Canada as a travel destination.

Overall, this analysis suggests that Canada's imagery strengths were largely associated with its natural richness. Attention must be given to bolstering Canada's urban centres within American markets to promote Canada's cultural attractions, events and ample opportunities for entertainment.

Impressions of Canada

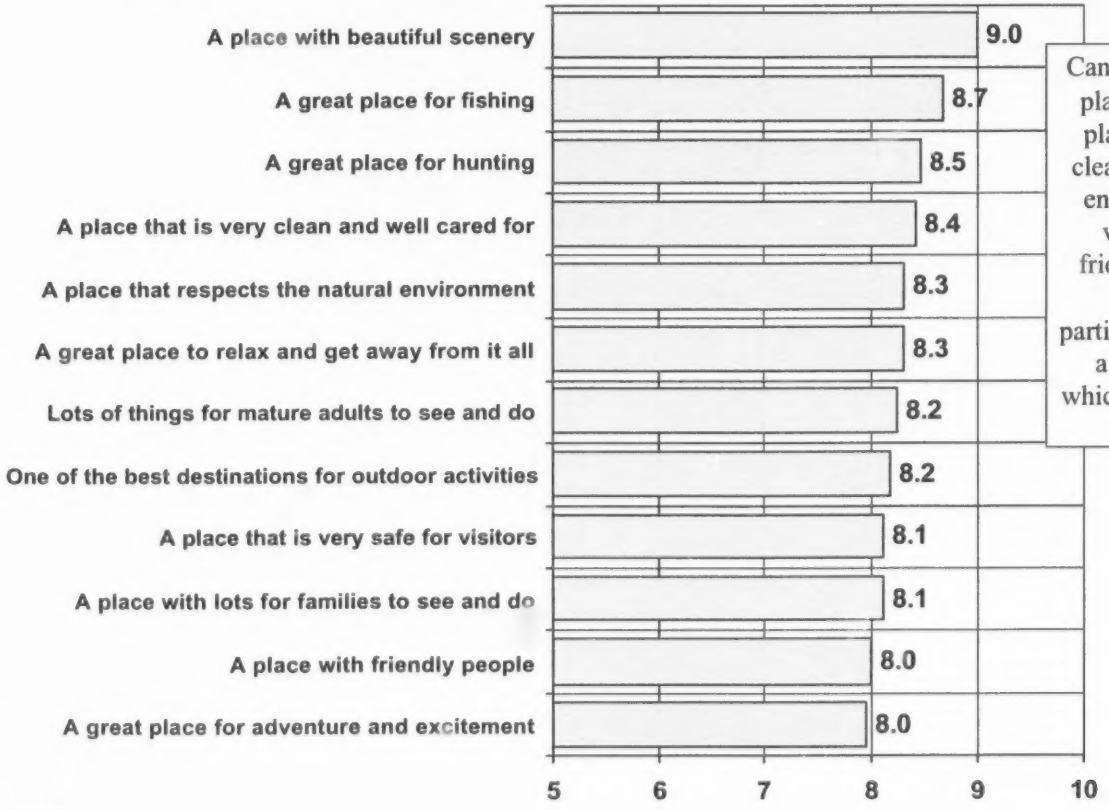
- Research Method -

In the mailback survey, respondents were asked to give their general impression of Canada. This was obtained by asking respondents to rate Canada on 25 image attributes using a 10-point scale where "10" was complete agreement that the statement described Canada, and "1" was complete disagreement that the statement described Canada (see pages 474 and 475 for a listing of the image attributes).

The image ratings were factorized to identify general image characteristics of Canada. Factor analysis is a statistical technique which identifies the underlying association between individual responses, and uses this information to construct more general or abstract image dimensions. The more general image dimensions identified through this process are considered the reflect underlying (or true) impressions of Canada that have been the basis of the individual's response to each attribute. The factors may be used to generate factor scores which reflect the individual's general impressions of Canada. These general impressions were plotted for various sectors of the market to identify their attitudes towards Canada as a vacation destination.

Attributes Most Closely Associated with Canada

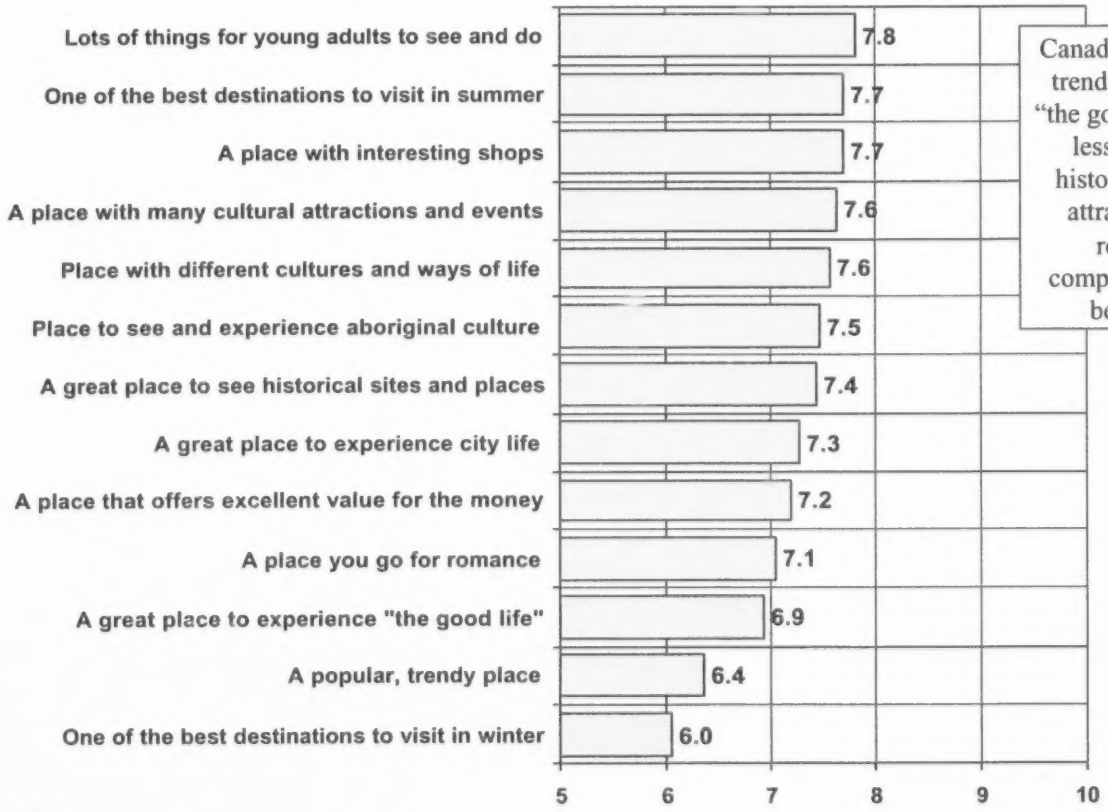
Base:Those Able to Rate Canada on At Least One Attribute: Canada & U.S.



Canada is most often perceived to be a place with beautiful scenery, a great place for fishing and hunting, and a clean, well-cared place for the natural environment. It is also considered a very safe place for tourists, with friendly people, where one can relax and get away from it all, and participate in outdoor activities. This is a very traditional view of Canada which tends to downplay Canada's rich culture and heritage.

Attributes Less Often Associated with Canada

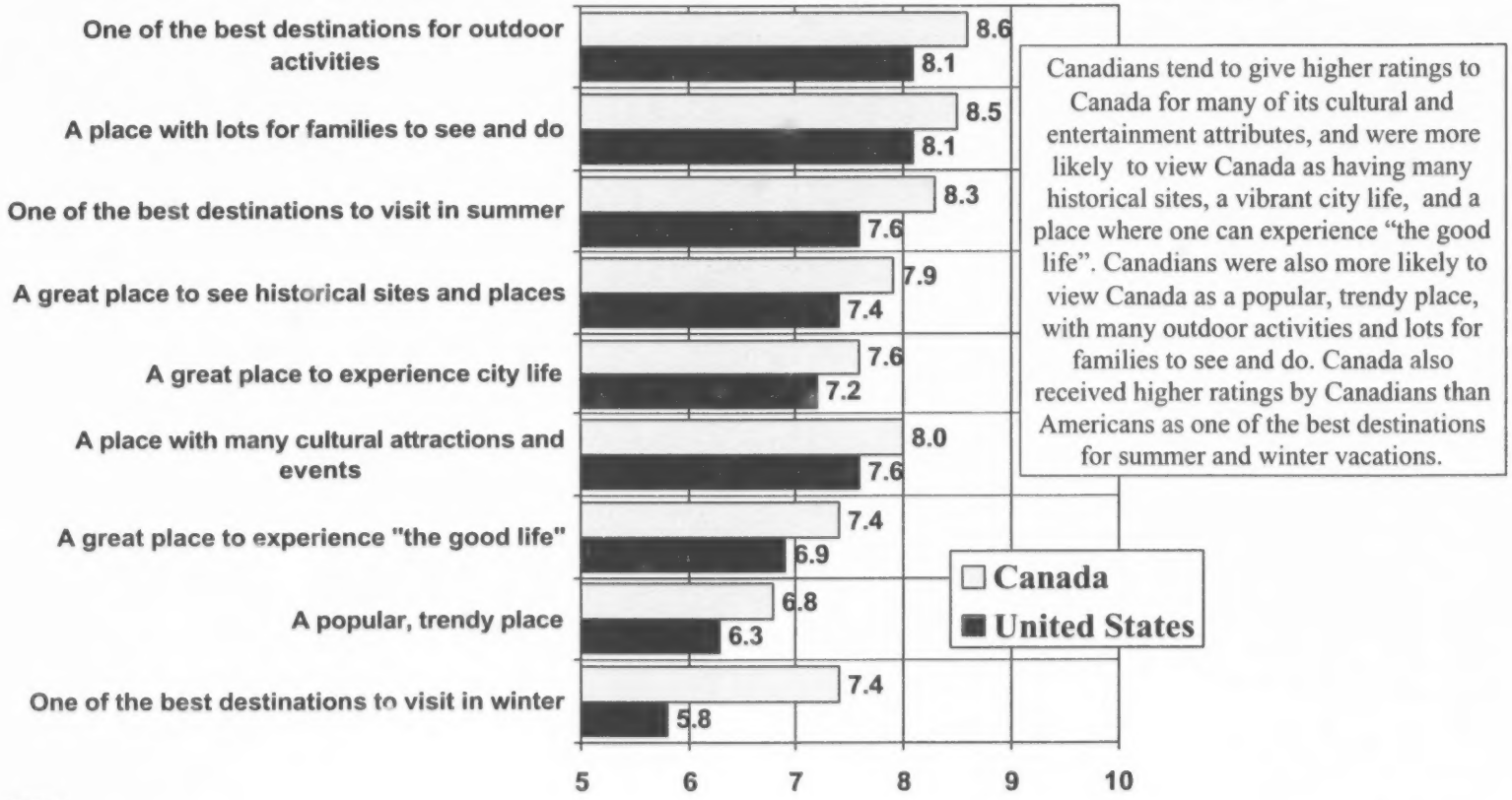
Base:Those Able to Rate Canada on At Least One Attribute: Canada & U.S.



Canada is less often viewed as a popular, trendy place where one can experience "the good life" (e.g., fine cruise). It is also less often considered to offer many historical sites, city life, many cultural attractions and events, or a place for romance. Canada also receives comparatively low ratings as one of the best places for winter vacations.

Attributes More Often Associated with Canada
By Canadians Compared To Americans

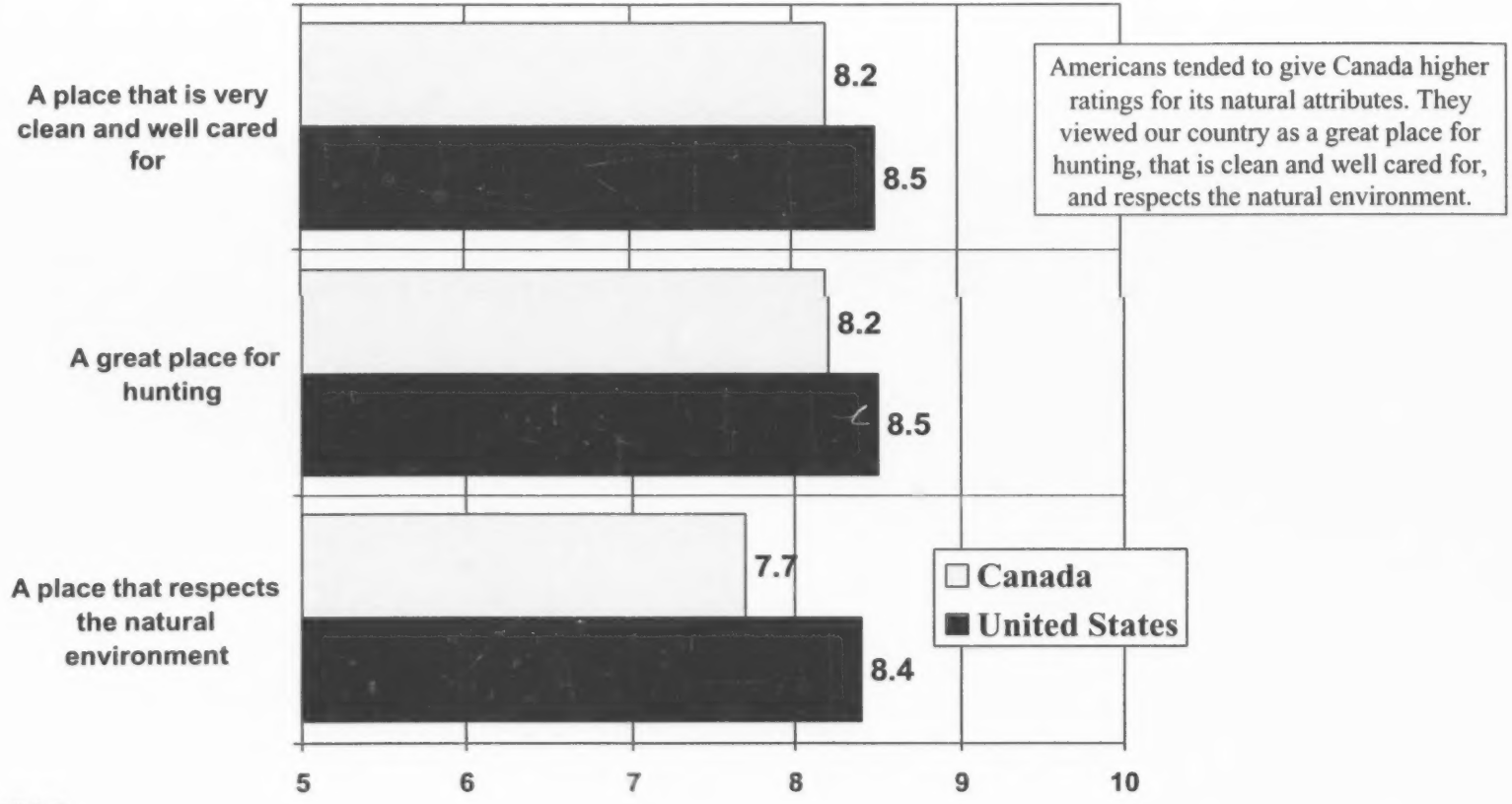
Base: Those Able to Rate Canada on At Least One Attribute: Canada & U.S.



Canadians tend to give higher ratings to Canada for many of its cultural and entertainment attributes, and were more likely to view Canada as having many historical sites, a vibrant city life, and a place where one can experience "the good life". Canadians were also more likely to view Canada as a popular, trendy place, with many outdoor activities and lots for families to see and do. Canada also received higher ratings by Canadians than Americans as one of the best destinations for summer and winter vacations.

Attributes More Often Associated with Canada
By Americans Compared To Canadians

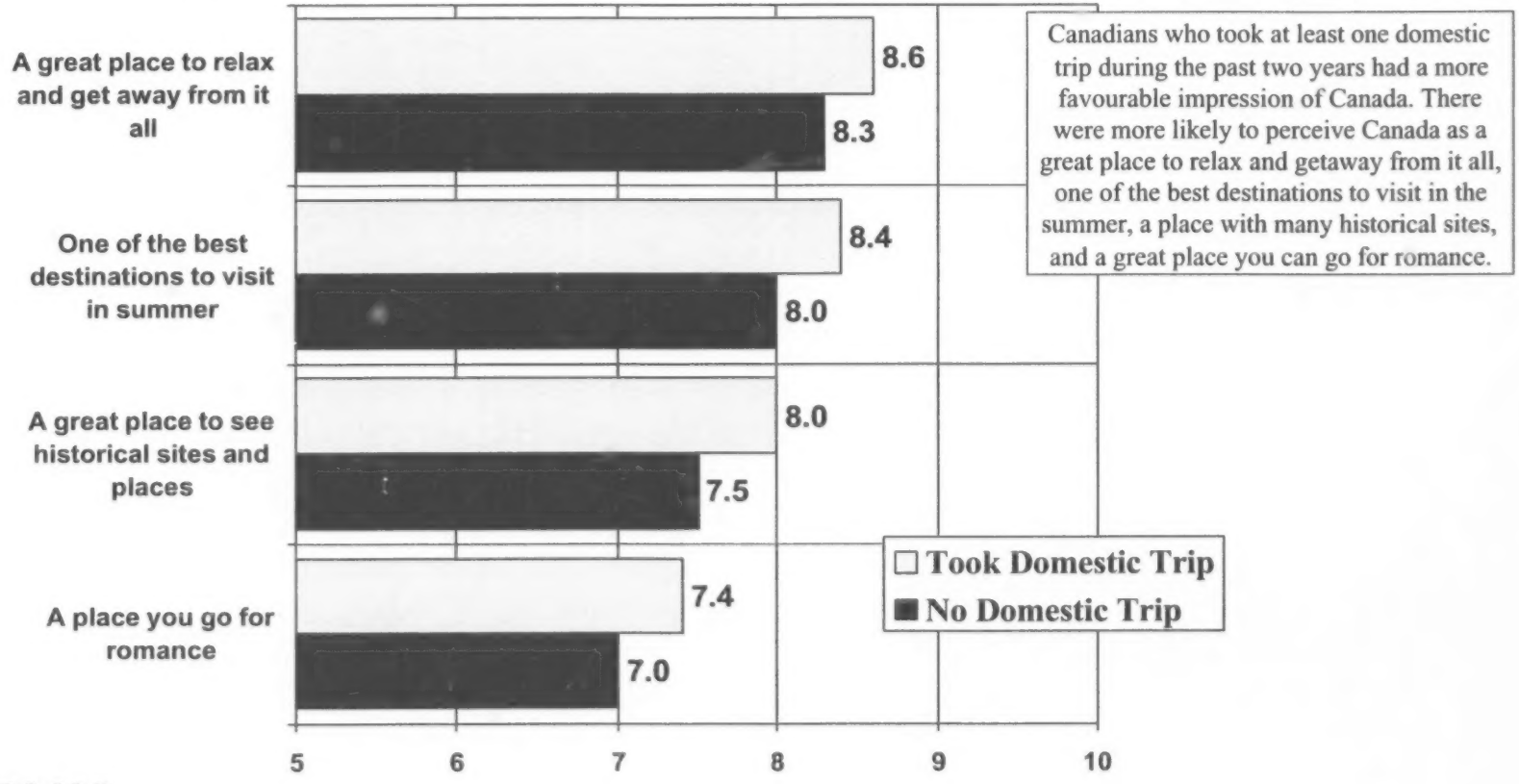
Base:Those Able to Rate Canada on At Least One Attribute: Canada & U.S.



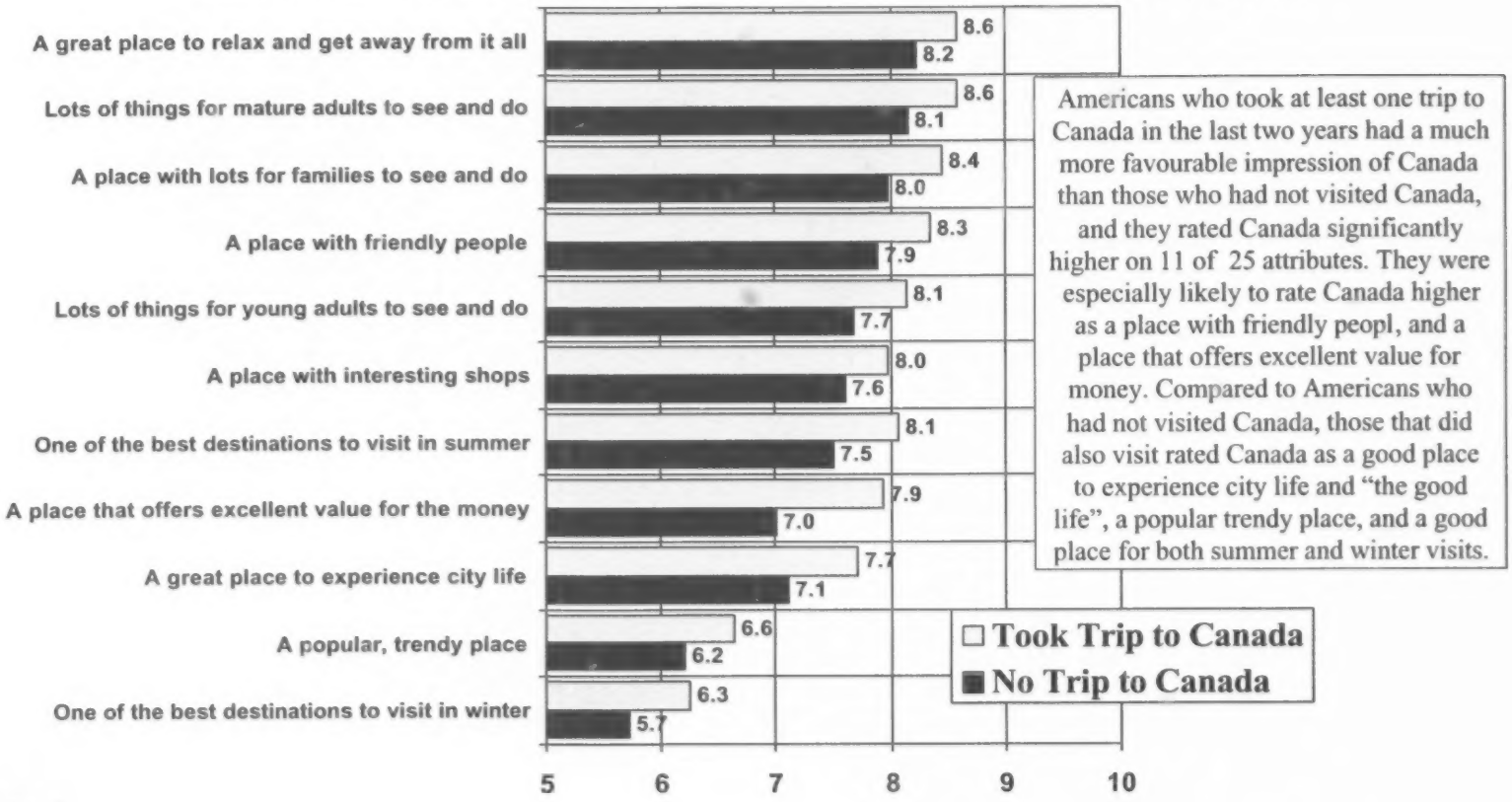
Attributes More Often Associated with Canada

By Canadians Who Traveled Domestically

Base:Those Taking a Domestic Trip in the Past two years versus Those Not Traveling



Attributes More Often Associated with Canada
By Americans Who Traveled To Canada
Base:Those Taking a Trip to Canada in the Past two years versus Those Not



Americans who took at least one trip to Canada in the last two years had a much more favourable impression of Canada than those who had not visited Canada, and they rated Canada significantly higher on 11 of 25 attributes. They were especially likely to rate Canada higher as a place with friendly peopl, and a place that offers excellent value for money. Compared to Americans who had not visited Canada, those that did also visit rated Canada as a good place to experience city life and "the good life", a popular trendy place, and a good place for both summer and winter visits.

Factor Analysis of Canada's Image Attributes

The image ratings of Canada were factor analysed to identify the primary image dimensions upon which Canada was assessed. Factor analysis is a statistical technique which uses the association between each individual image attributes to construct more general image attributes. The more general image dimensions identified through this process are considered to reflect underlying (or true) impressions of Canada that have been the basis of the individual's response to each attribute. The factors may be used to generate factor scores, which measure the degree to which each general impression of Canada is held by the respondent. The 25 image factors were grouped into two broader image dimensions as follows:

Culture & Entertainment

Nature & Outdoor Activities

Culture & Entertainment

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history, and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centres than its natural richness and opportunities for outdoor vacation activities.

- A popular, trendy place
- A place with many cultural attractions and events
- A great place to experience city life (e.g., nightlife, shopping)
- A place with interesting shops
- A place you go for romance
- A great place to see historical sites and important places in history
- A place with lots of things for young adults to see and do
- A place with lots for families to see and do
- A great place to experience different cultures and ways of life
- A place with lots of things for mature adults to see and do

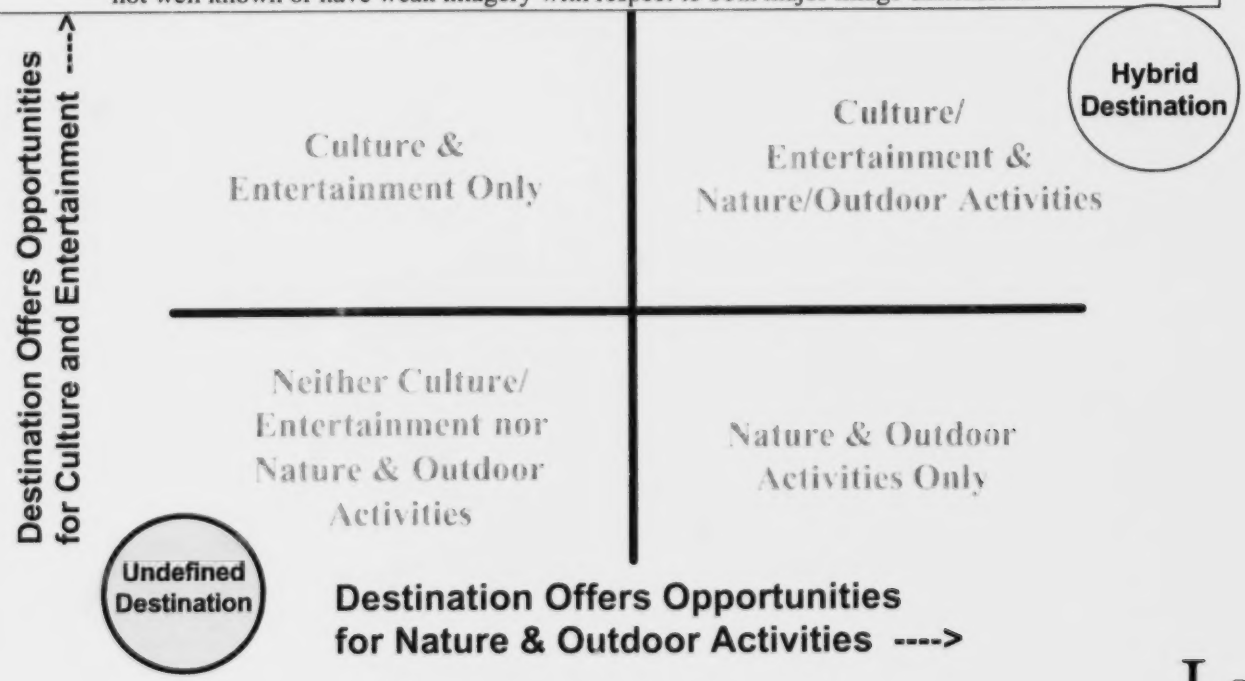
Nature and Outdoor Activities

A destination that is perceived to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for, and to be a place that respects the natural environment. Destinations which offer opportunities to experience nature and participate in outdoor activities are also perceived to be very safe for tourists, great places to relax and get away from it all and great places for adventure and excitement. Such destinations are generally better known for their natural richness than their urban and cultural richness.

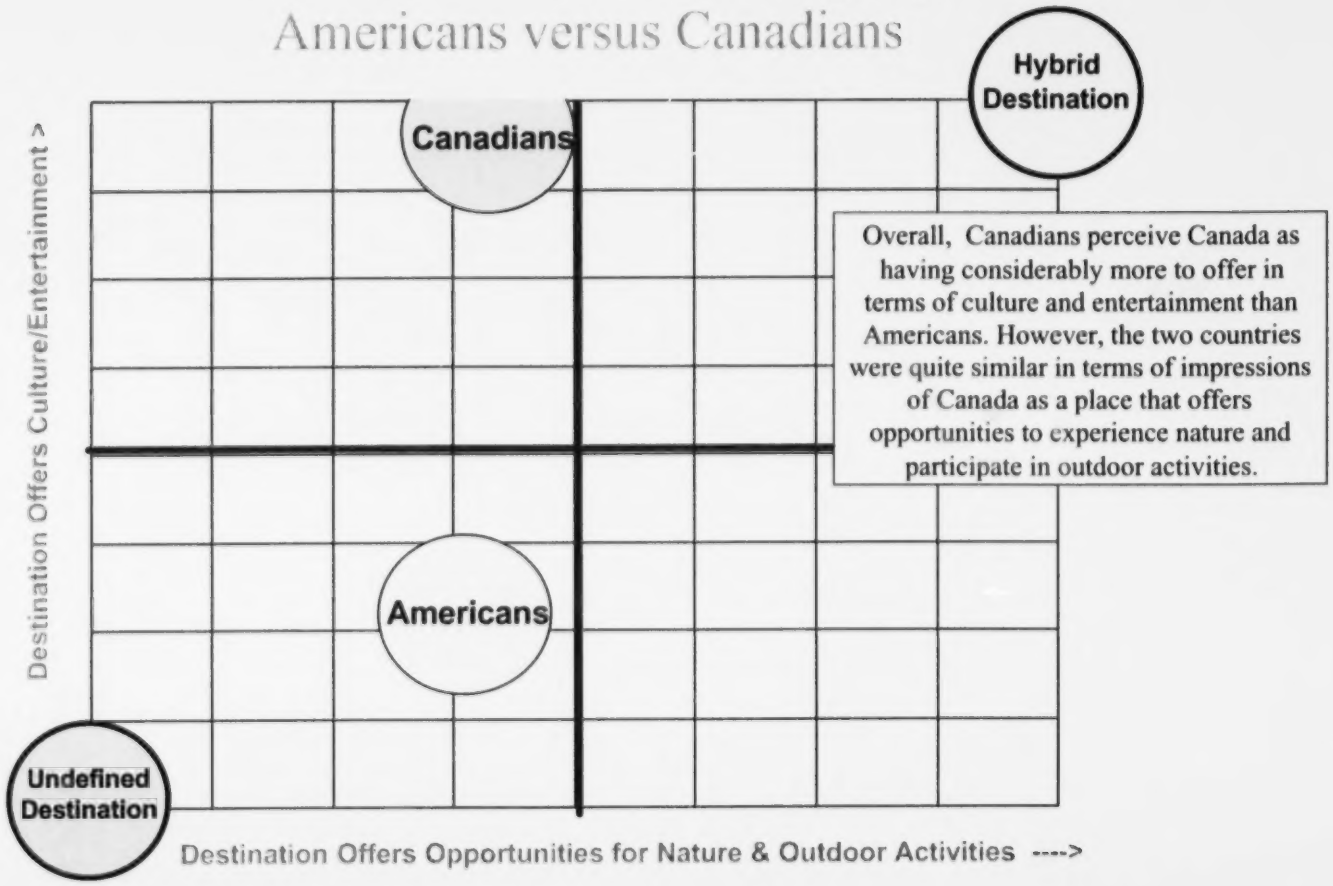
- A great place for fishing
- A great place for hunting
- A place that respects the natural environment
- One of the best destinations for outdoor activities
- A place with beautiful scenery
- A place that is very clean and well cared for
- A place that is safe for tourists
- A great place for adventure and excitement
- A great place to relax and get away from it all

Destination Map

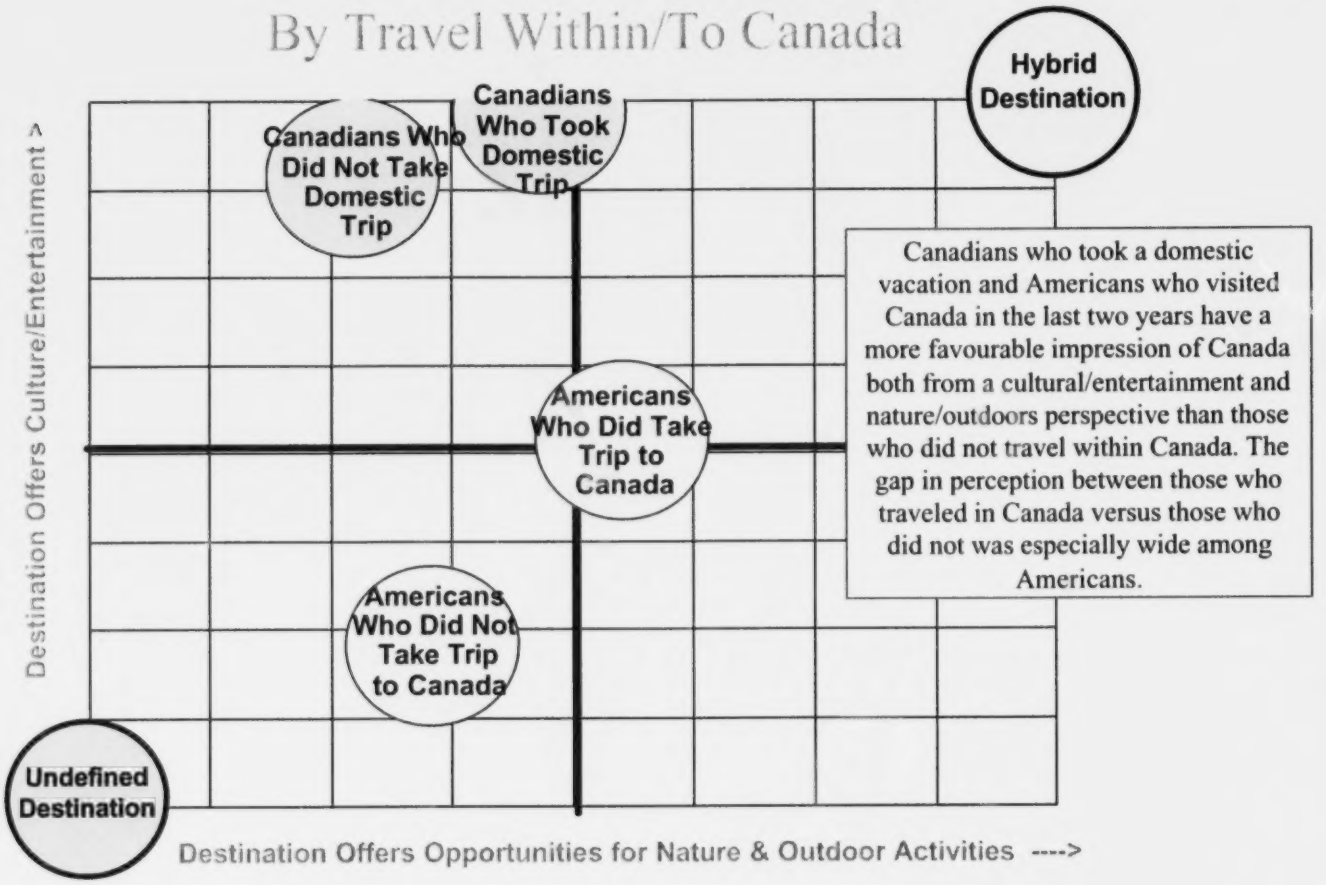
The values of each destination on each of the two major image dimensions can be plotted on a destination map to indicate the positioning of each destination relative to others. Destinations in the upper left quadrant are considered to offer excellent opportunities to experience culture and entertainment activities, but are considered less likely to provide opportunities to experience nature and participate in outdoor activities. Destinations in the lower right quadrant are considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. Destinations found in upper right quadrant are considered hybrid destinations offering opportunities for both nature/outdoor experiences and culture/entertainment vacation experiences. On the other hand, those found in the lower left quadrant are either not well known or have weak imagery with respect to both major image dimensions.



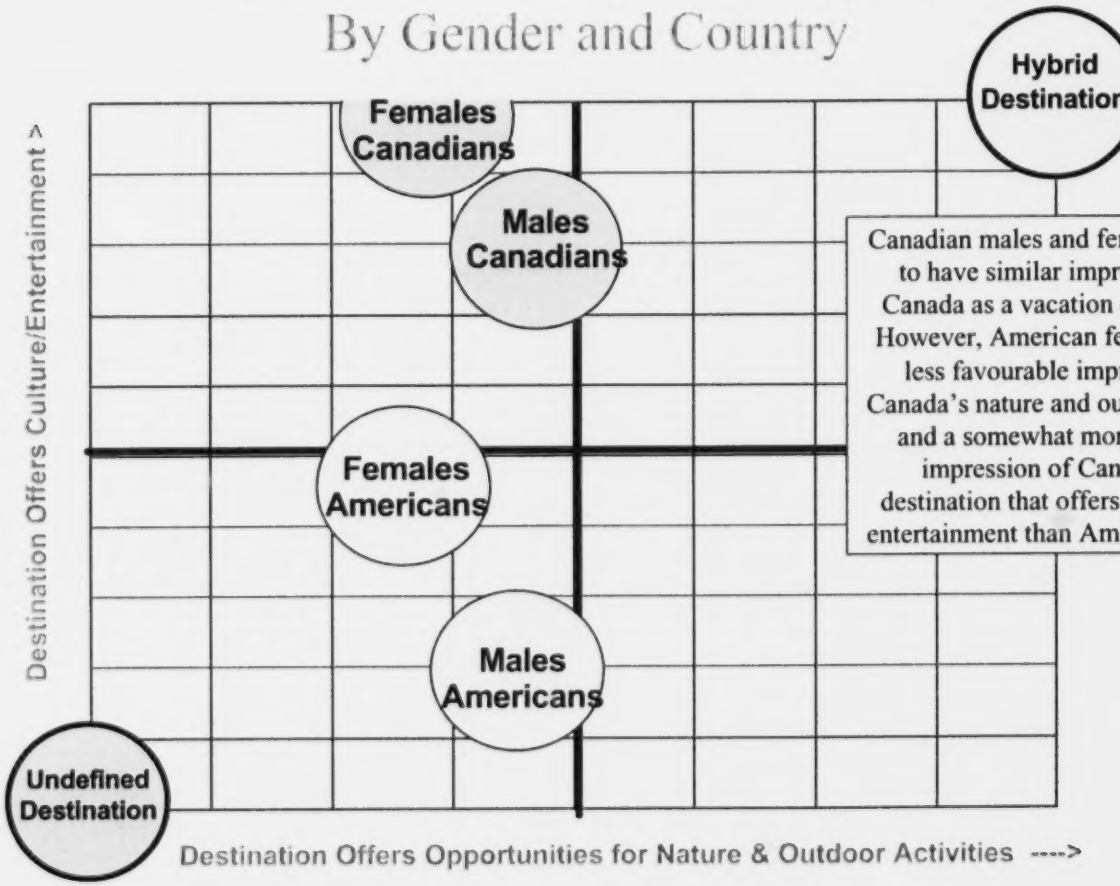
Canada's Vacation Imagery
Americans versus Canadians



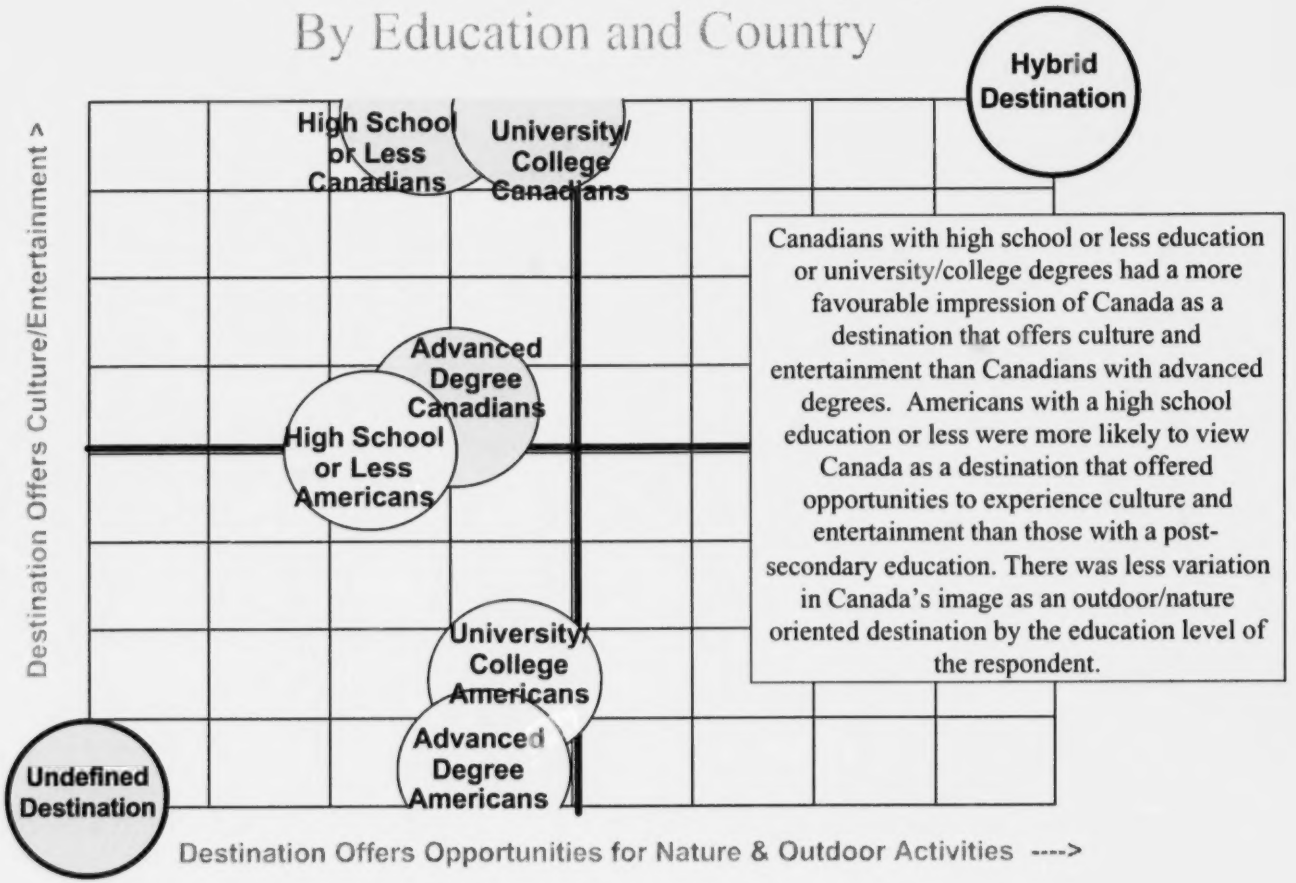
Canada's Vacation Imagery
By Travel Within/To Canada



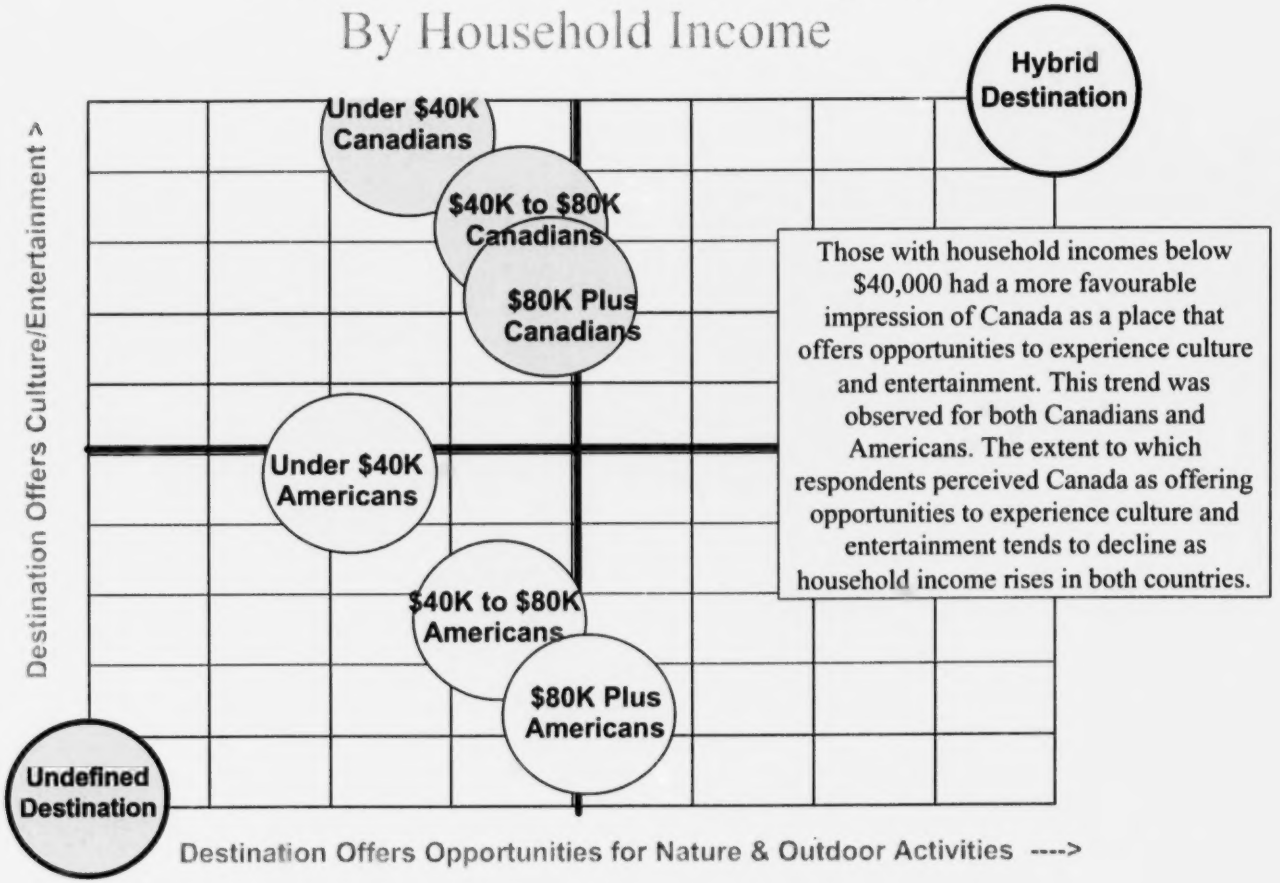
Canada's Vacation Imagery
By Gender and Country



Canada's Vacation Imagery
By Education and Country



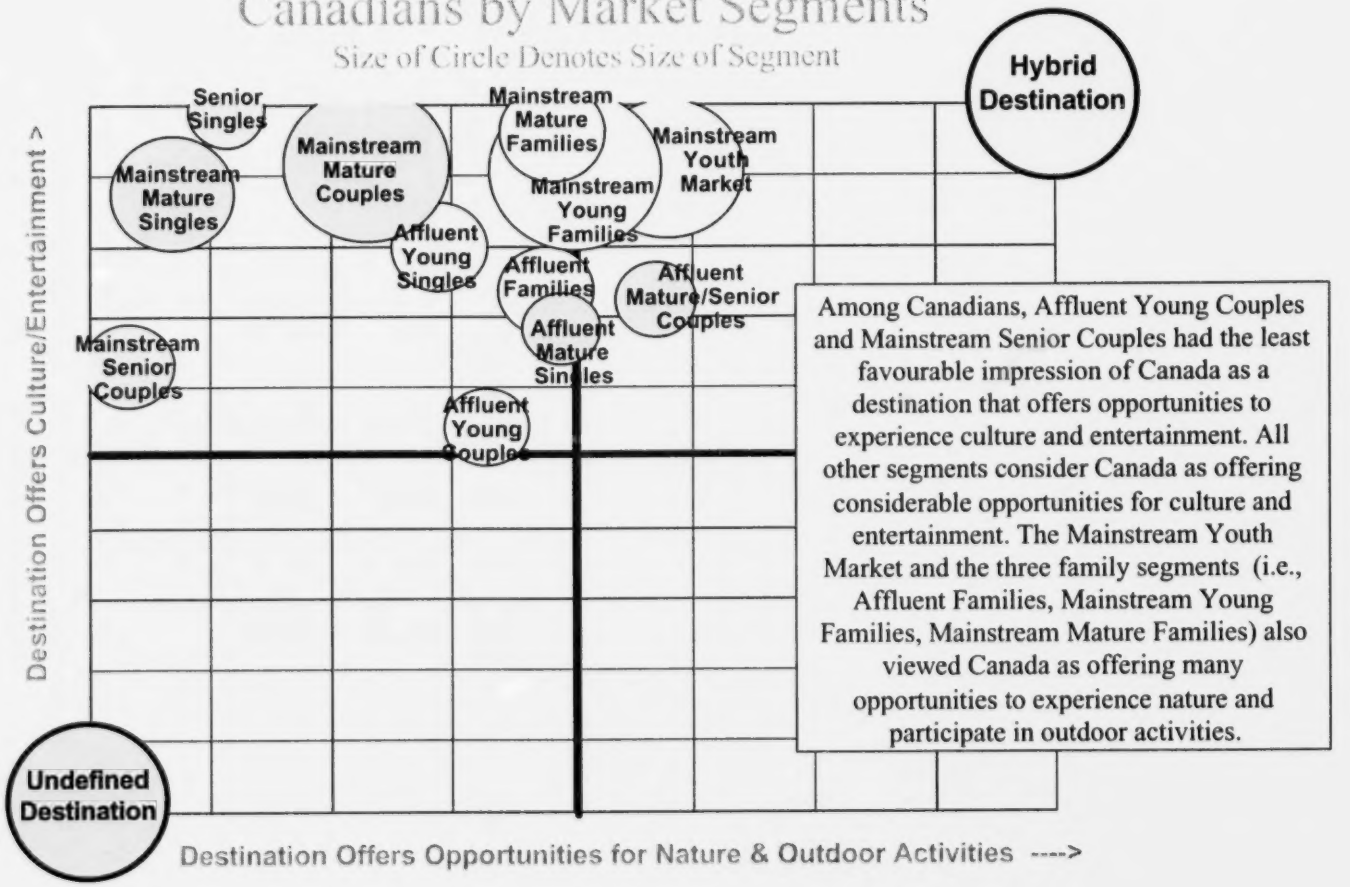
Canada's Vacation Imagery
By Household Income



Canada's Vacation Imagery

Canadians by Market Segments

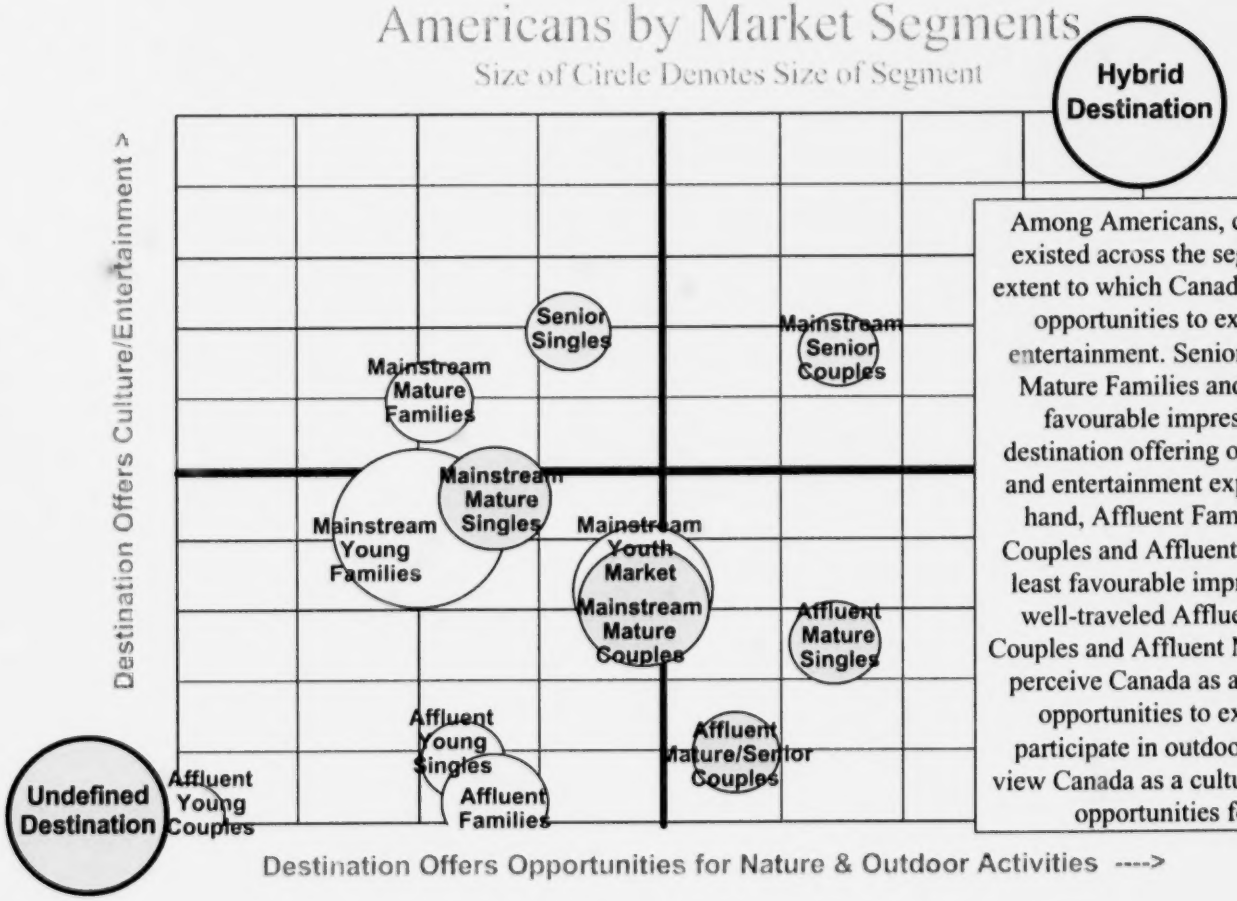
Size of Circle Denotes Size of Segment



Canada's Vacation Imagery

Americans by Market Segments

Size of Circle Denotes Size of Segment



Among Americans, considerable variations existed across the segments concerning the extent to which Canada was perceived to offer opportunities to experience culture and entertainment. Senior Couples, Mainstream Mature Families and Senior Singles had a favourable impression of Canada as a destination offering opportunities for culture and entertainment experiences. On the other hand, Affluent Families, Affluent Young Couples and Affluent Young Singles had the least favourable impression of Canada. The well-traveled Affluent Mature and Senior Couples and Affluent Mature Singles generally perceive Canada as a destination that offers opportunities to experience nature and participate in outdoor activities, but do not view Canada as a culturally rich place offering opportunities for entertainment.

Section Twenty

Impressions of Ontario

Impressions of Ontario

- Key Findings -

Among Americans, Ontario's image was quite similar to that of Canada. As such, Americans viewed Ontario as a place with beautiful scenery, which is great for hunting and fishing, and well cared for. They considered Ontario a good place to relax and get away from it all, a place for romantic vacations and a place with very friendly people. On the other hand, Ontario was less well known for its cultural richness (museums, art galleries, theatre) and as a place which offers opportunities to experience "the good life" (e.g., fine dining). These image weaknesses may be reducing the likelihood that Ontario is considered as a vacation destination by those seeking cultural and urban experiences. On a positive note, Americans who have taken a trip to Ontario in the last two years had a much more favourable impression of the province, suggesting that travel to Ontario does leave a positive impression with Americans.

Among Americans, Ontario's image is weakest among younger travelers, those with more education and higher household incomes. American Affluent Young Singles, Affluent Young Couples and Affluent Families have an especially weak image of Ontario. These prime travel markets need to be targeted in future image-building campaigns.

Among Canadians from other provinces, Ontario was primarily seen as offering opportunities for culture and entertainment (rather than nature and outdoor activities). The extent to which Ontario was perceived as a cultural and entertainment centre was especially evident among those from the Atlantic provinces. (Note: Respondents from Quebec seem to have an image of Ontario that is comparable to that of the average American). This suggests that Ontario's larger urban centres tend to exert a greater influence on the image of the province held by Canadians from other provinces. This outcome is understandable insofar as many Canadians are likely to view Ontario as the most populous and urban region of Canada, but offering opportunities to experience nature that are similar to those of other regions of Canada. As such, it may be best to promote Ontario domestically as a cultural and entertainment centre rather than attempting to strengthen Ontario's image as a good destination to experience nature and participate in outdoor activities.

Impressions of Ontario

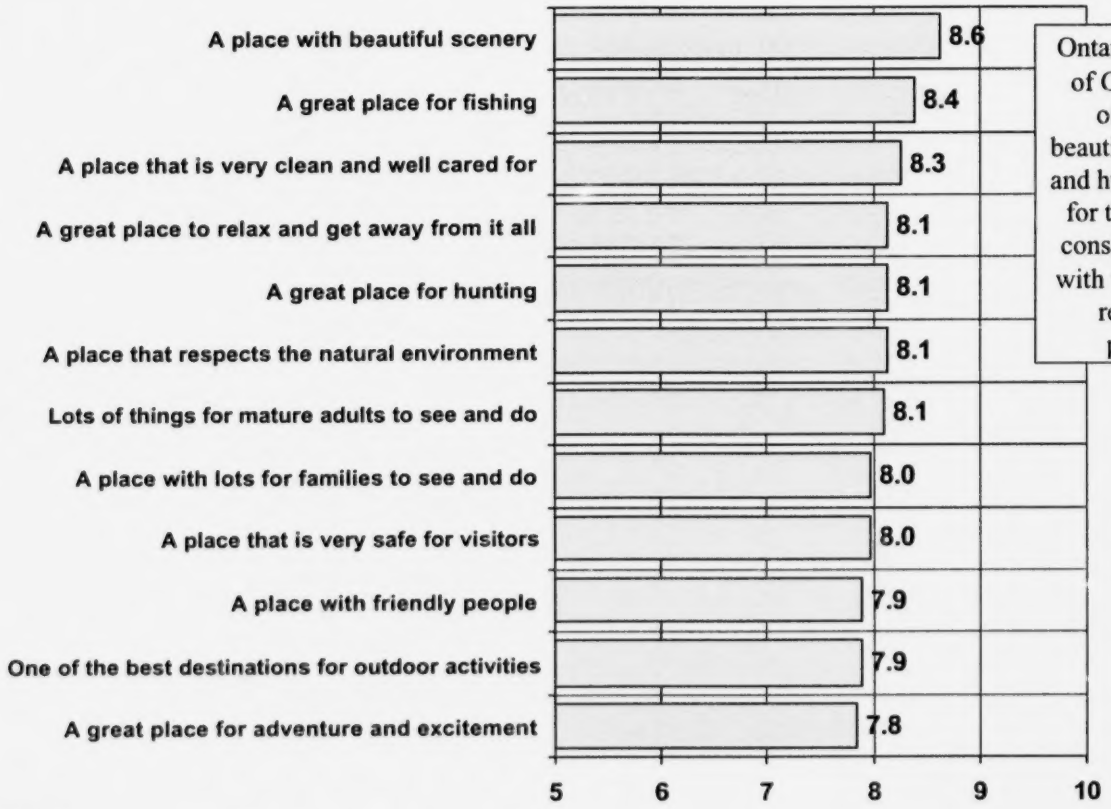
- Research Method -

In the mailback survey, respondents were asked to give their general impression of Ontario. As with the assessment of Canada, this was obtained by asking respondents to rate Ontario on 25 image attributes using a ten point scale where "10" was "completely agreed that the statement" describes Ontario and "1" was completely disagreed that the statement describes Ontario (see pages 496 and 497 for a listing of the image attributes).

The image ratings were factorized to identify general image characteristics of Ontario. These were plotted for various types of travelers to identify their general impressions of Ontario.

Attributes Most Closely Associated with Ontario

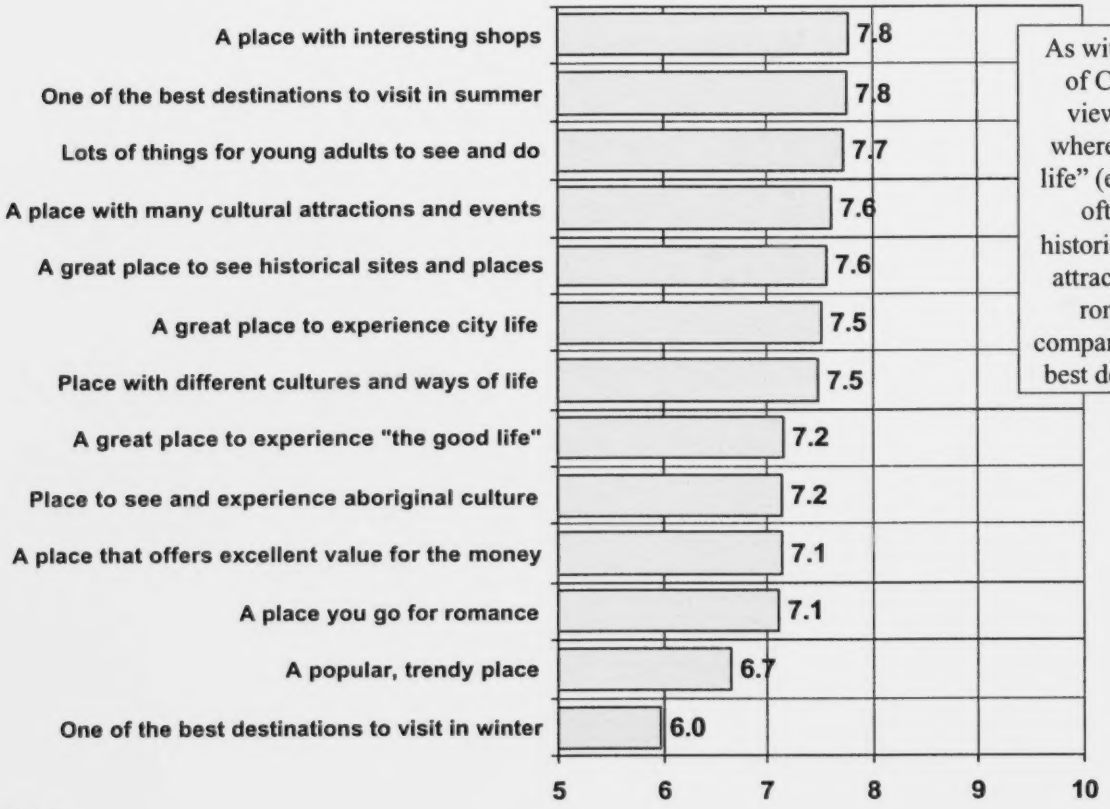
Base: Those Able to Rate Ontario on At Least One Attribute: Canada & U.S.



Ontario's image was quite similar to that of Canada. As such, Ontario was most often perceived to be a place with beautiful scenery, a great place for fishing and hunting, and a clean, well-cared place for the natural environment. It was also considered a very safe place for tourists, with very friendly people, where one can relax and get away from it all, nd participate in outdoor activities.

Attributes Less Often Associated with Ontario

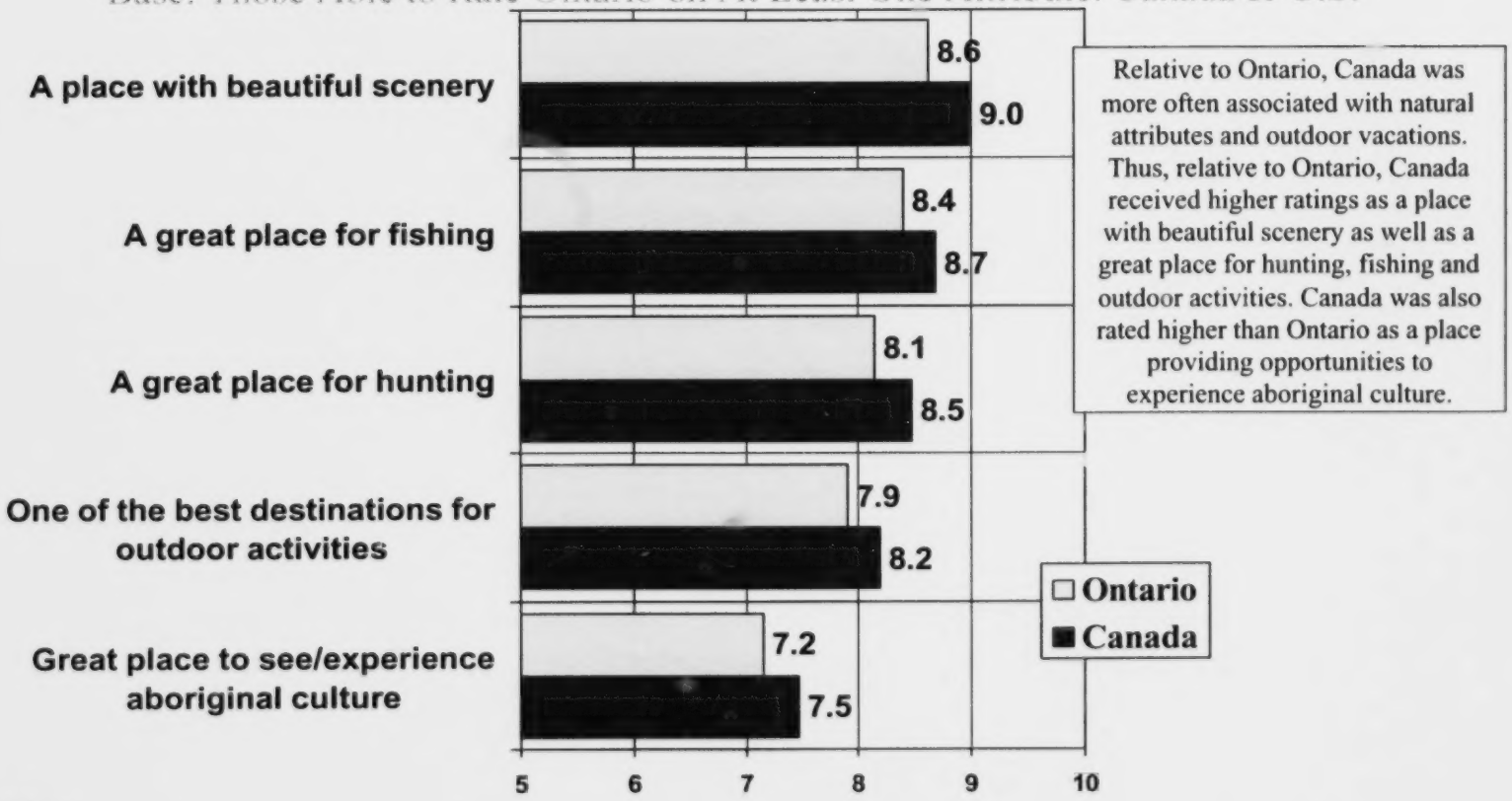
Base: Those Able to Rate Ontario on At Least One Attribute: Canada & U.S.



As with the respondents' impressions of Canada, Ontario was less often viewed as a popular, trendy place where one can experience "the good life" (e.g., fine cruise). It was also less often considered to offer many historical sites, city life, many cultural attractions and events, or a place for romance. Ontario also received comparatively low ratings as one of the best destinations for winter vacations.

Attributes Where Canada Receives Higher Ratings Than Ontario

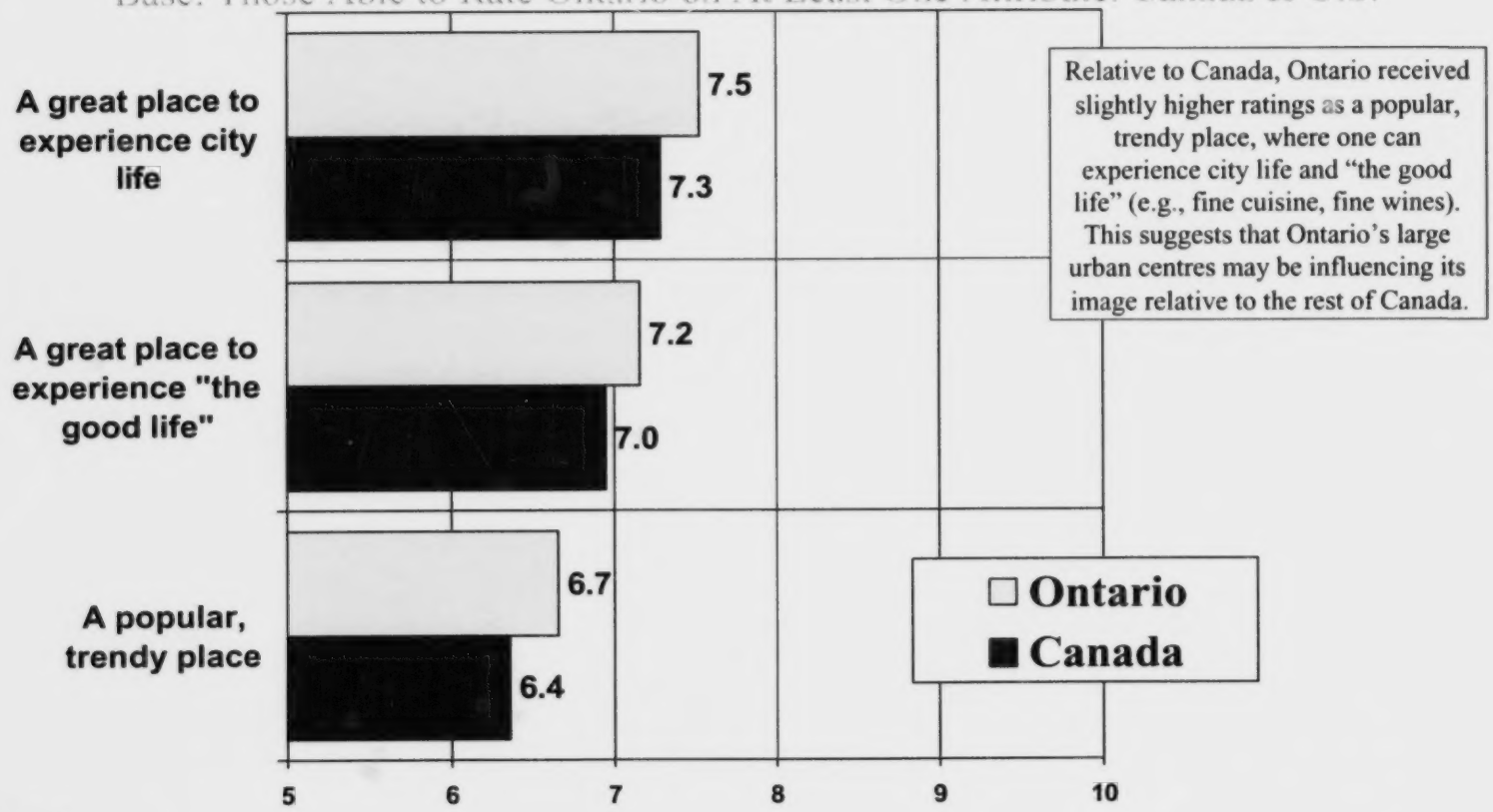
Base: Those Able to Rate Ontario on At Least One Attribute: Canada & U.S.



Relative to Ontario, Canada was more often associated with natural attributes and outdoor vacations. Thus, relative to Ontario, Canada received higher ratings as a place with beautiful scenery as well as a great place for hunting, fishing and outdoor activities. Canada was also rated higher than Ontario as a place providing opportunities to experience aboriginal culture.

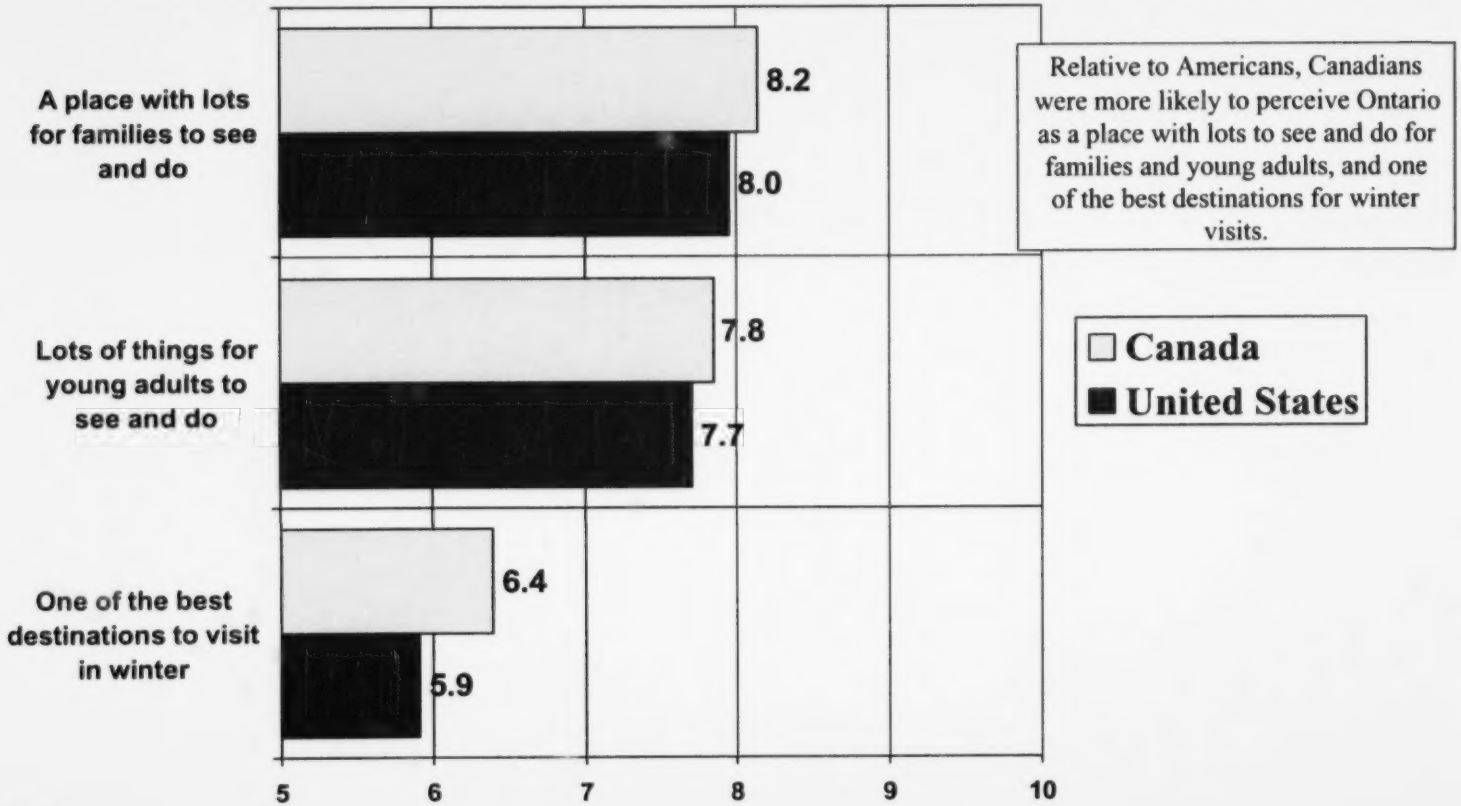
Attributes Where Ontario Receives Higher Ratings Than Canada

Base: Those Able to Rate Ontario on At Least One Attribute: Canada & U.S.

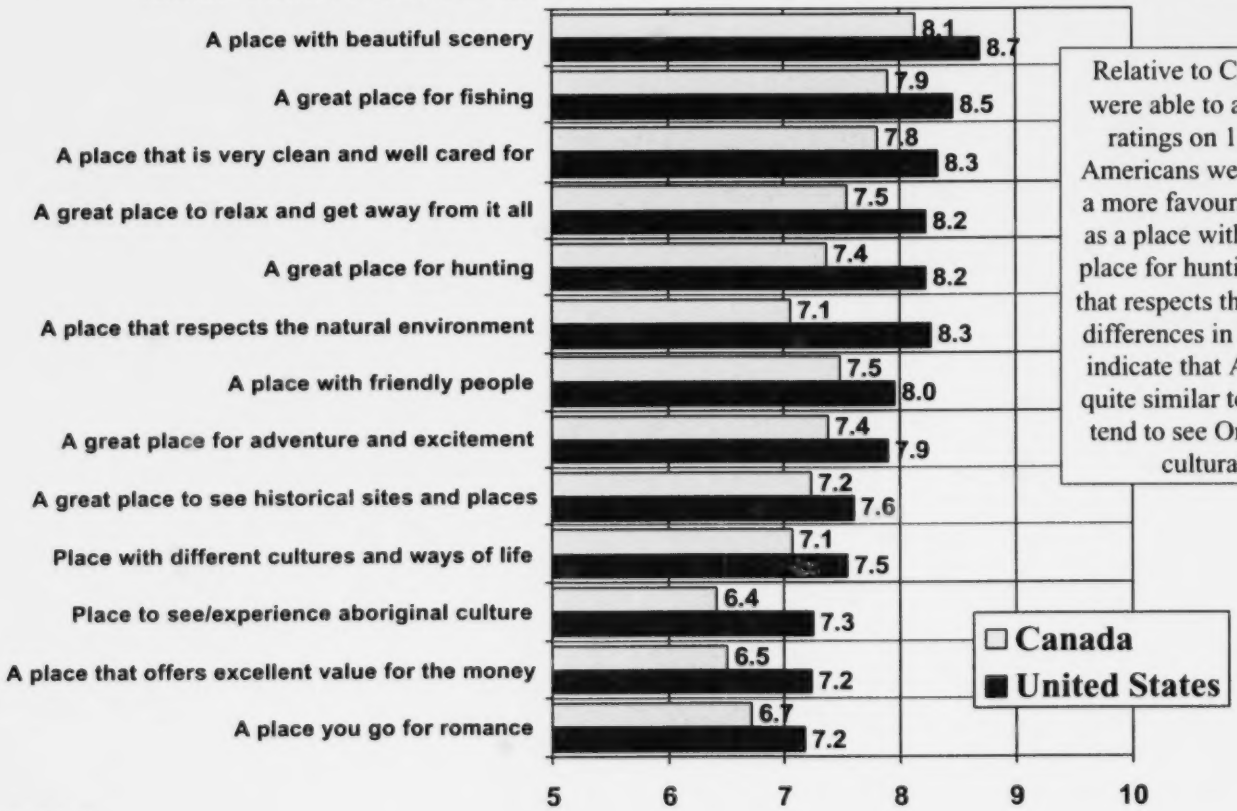


Relative to Canada, Ontario received slightly higher ratings as a popular, trendy place, where one can experience city life and "the good life" (e.g., fine cuisine, fine wines). This suggests that Ontario's large urban centres may be influencing its image relative to the rest of Canada.

Attributes Most Closely Associated with Ontario
By Canadians Relative to Americans
Base: Those Able to Rate Ontario on At Least One Attribute: Canada & U.S.



Attributes Most Closely Associated with Ontario
By Americans Relative To Canadians
Base: Those Able to Rate Ontario on At Least One Attribute: Canada & U.S.

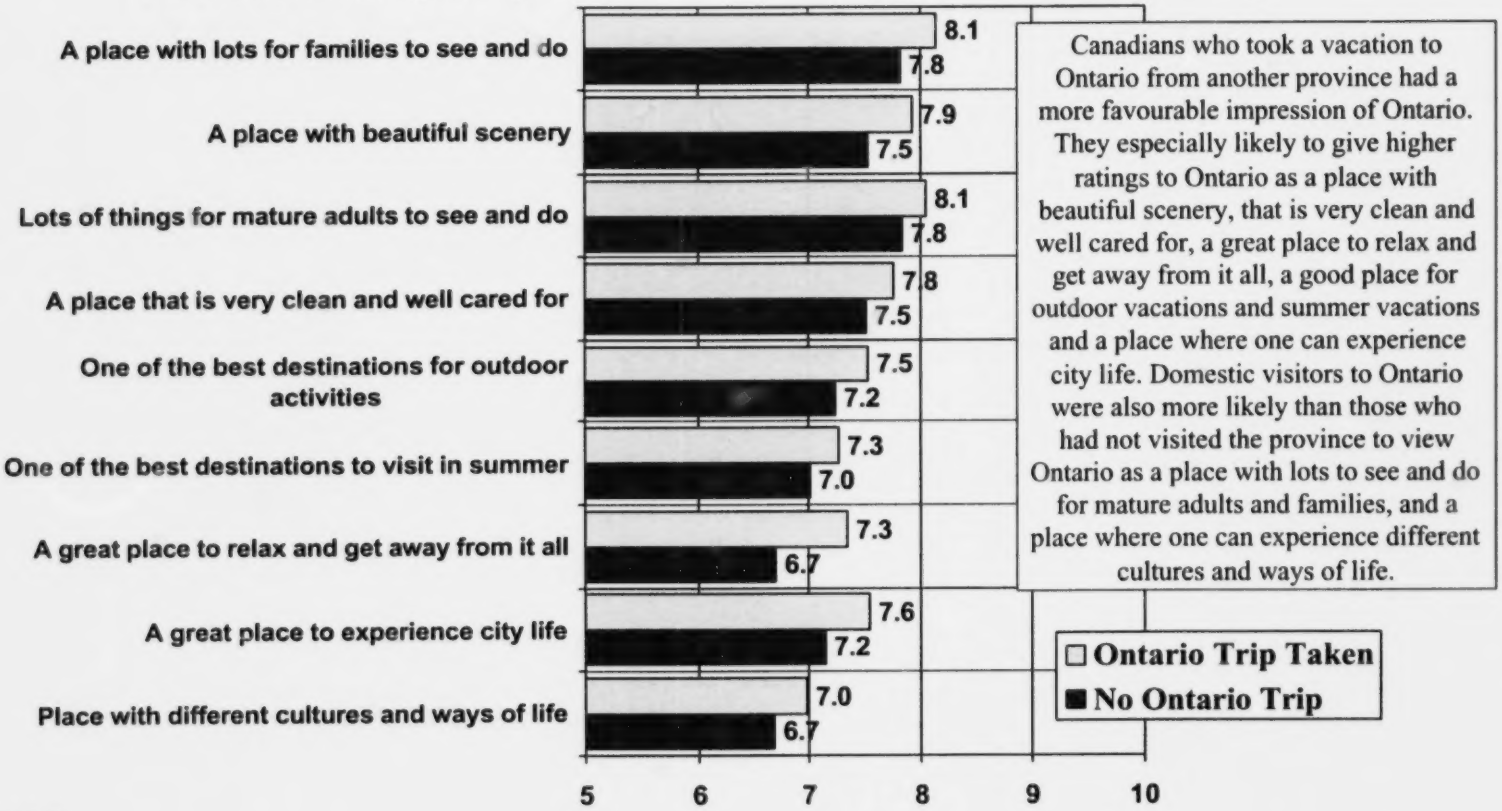


Relative to Canadians, Americans who were able to assess Ontario gave higher ratings on 13 of 25 image attributes. Americans were especially likely to have a more favourable impression of Ontario as a place with beautiful scenery, a great place for hunting and fishing, and a place that respects the natural environment. The differences in the impressions of Ontario indicate that Americans view Ontario as quite similar to Canada, while Canadians tend to see Ontario as a more urban and culturally rich destination.

Attributes More Often Associated with Ontario

By Canadians Who Traveled To Ontario

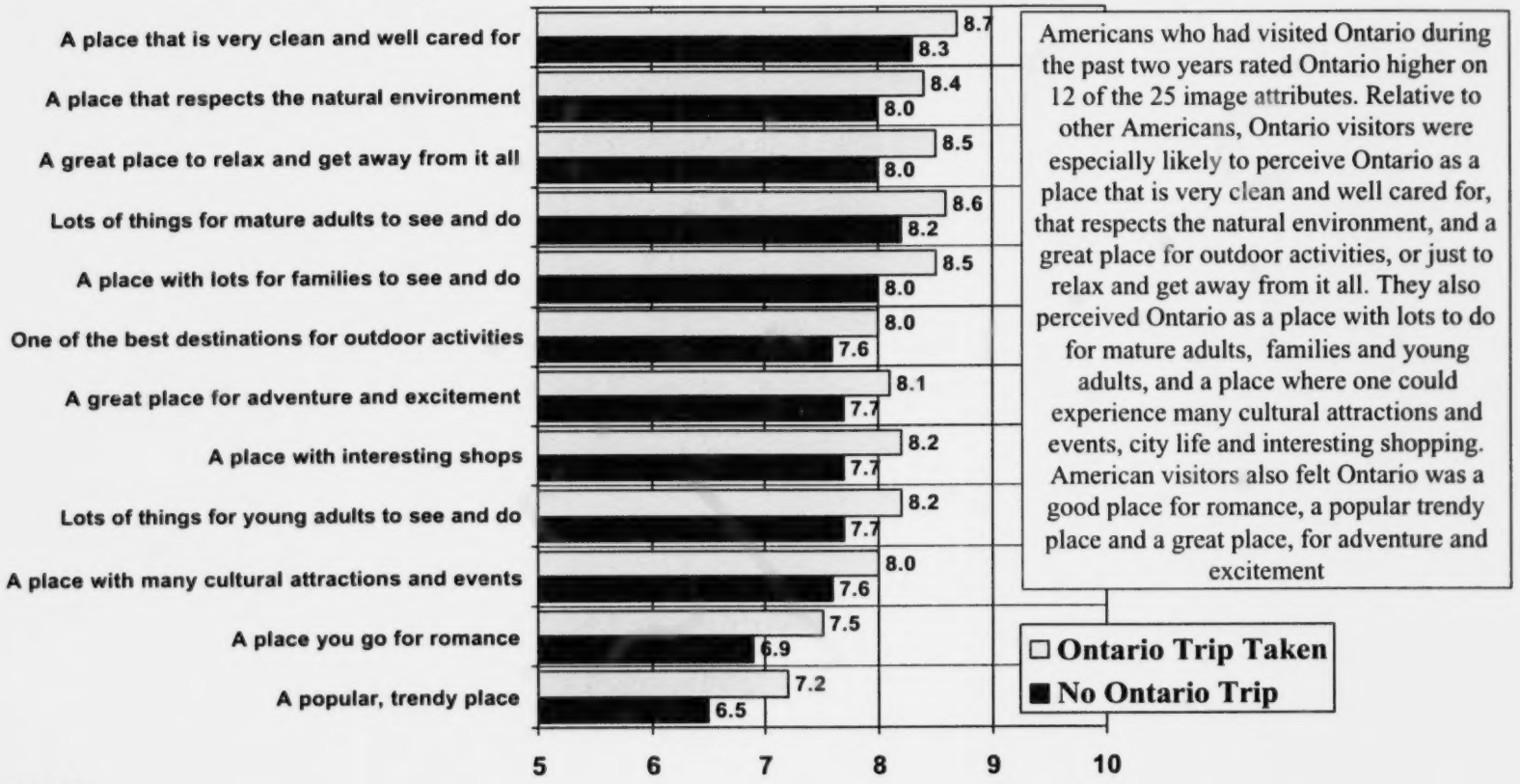
Base: Those Taking a Trip From Other Provinces to Ontario in the Past two years



Canadians who took a vacation to Ontario from another province had a more favourable impression of Ontario. They especially likely to give higher ratings to Ontario as a place with beautiful scenery, that is very clean and well cared for, a great place to relax and get away from it all, a good place for outdoor vacations and summer vacations and a place where one can experience city life. Domestic visitors to Ontario were also more likely than those who had not visited the province to view Ontario as a place with lots to see and do for mature adults and families, and a place where one can experience different cultures and ways of life.

Attributes More Often Associated with Ontario
By Americans Who Traveled To Ontario

Base:Those Taking a Trip From the United States to Ontario in the Past two years



Americans who had visited Ontario during the past two years rated Ontario higher on 12 of the 25 image attributes. Relative to other Americans, Ontario visitors were especially likely to perceive Ontario as a place that is very clean and well cared for, that respects the natural environment, and a great place for outdoor activities, or just to relax and get away from it all. They also perceived Ontario as a place with lots to do for mature adults, families and young adults, and a place where one could experience many cultural attractions and events, city life and interesting shopping. American visitors also felt Ontario was a good place for romance, a popular trendy place and a great place, for adventure and excitement

Factor Analysis of Ontario's Image Attributes

The image ratings of Ontario were factor analysed to identify the primary image dimensions upon which Ontario was assessed. Factor analysis is a statistical technique which identifies the underlying association between individual responses and uses this information to construct more general or abstract image dimensions. The more general image dimensions identified through this process are considered to reflect the underlying (or true) impressions of Ontario that have been the basis of the individual's response to each attribute. The factors may be used to generate factor scores which measure the degree to which each general impression of Ontario is held by the respondent. As with the analysis of Canada's imagery, the factor analysis of Ontario's image revealed broader image attributes:

Culture & Entertainment

Nature & Outdoor Activities

Culture & Entertainment

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history, and a place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centres than its natural richness and opportunities for outdoor vacation activities.

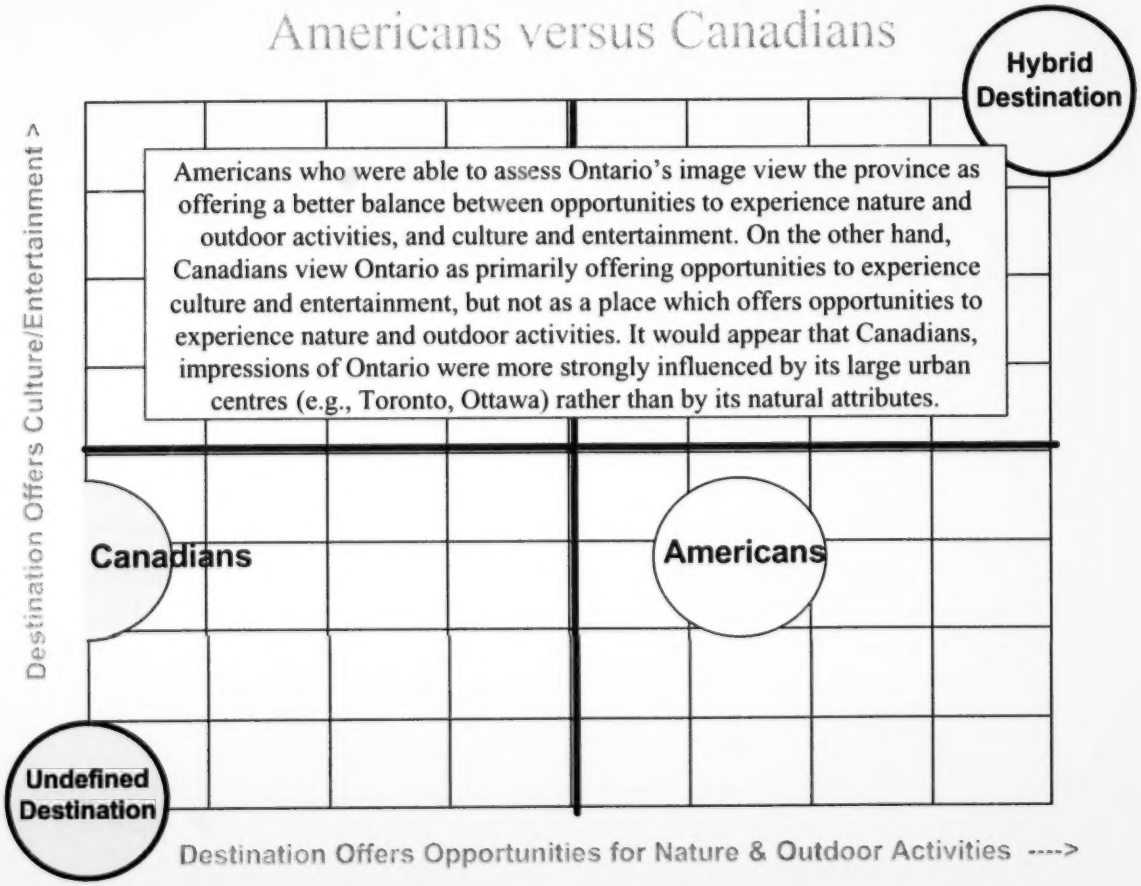
- A great place to experience "the good life" (e.g., fine cruise)
- A great place to experience city life (e.g., nightlife, shopping)
- A place with many cultural attractions and events
- A popular, trendy place
- A place with interesting shops
- A place with lots of things for young adults to see and do
- A great place to see historical sites and important places in history
- A place with lots for families to see and do
- A place with lots of things for mature adults to see and do
- A place you go for romance
- A great place to experience different cultures and ways of life
- A place that offers excellent value for the money
- A place to experience adventure and excitement

Nature and Outdoor Activities

A destination that is perceived to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for, and to be a place that respects the natural environment. Destinations which offer opportunities to experience nature and participate in outdoor activities are also perceived to be safe for tourist, great places to relax and get away from it all, and great places for adventure and excitement. Such destinations are generally better known for their natural richness than as urban and cultural centres.

- A great place for fishing
- A great place for hunting
- A place that respects the natural environment
- One of the best destinations for outdoor activities
- A place with beautiful scenery
- A great place to relax and get away from it all
- A place that is very clean and well cared for
- A place with friendly people
- A place that is safe for tourists

Ontario's Vacation Imagery
Americans versus Canadians



Ontario's Vacation Imagery
Americans By Region

Middle Atlantic
Pennsylvania, New York, New Jersey

East North Central
Wisconsin, Illinois, Michigan, Ohio, Indiana

New England
Maine,Connecticut, Massachusetts, Rhode Island, Vermont

West North Central
Kansas, Nebraska, South Dakota, Missouri, Iowa, Minnesota

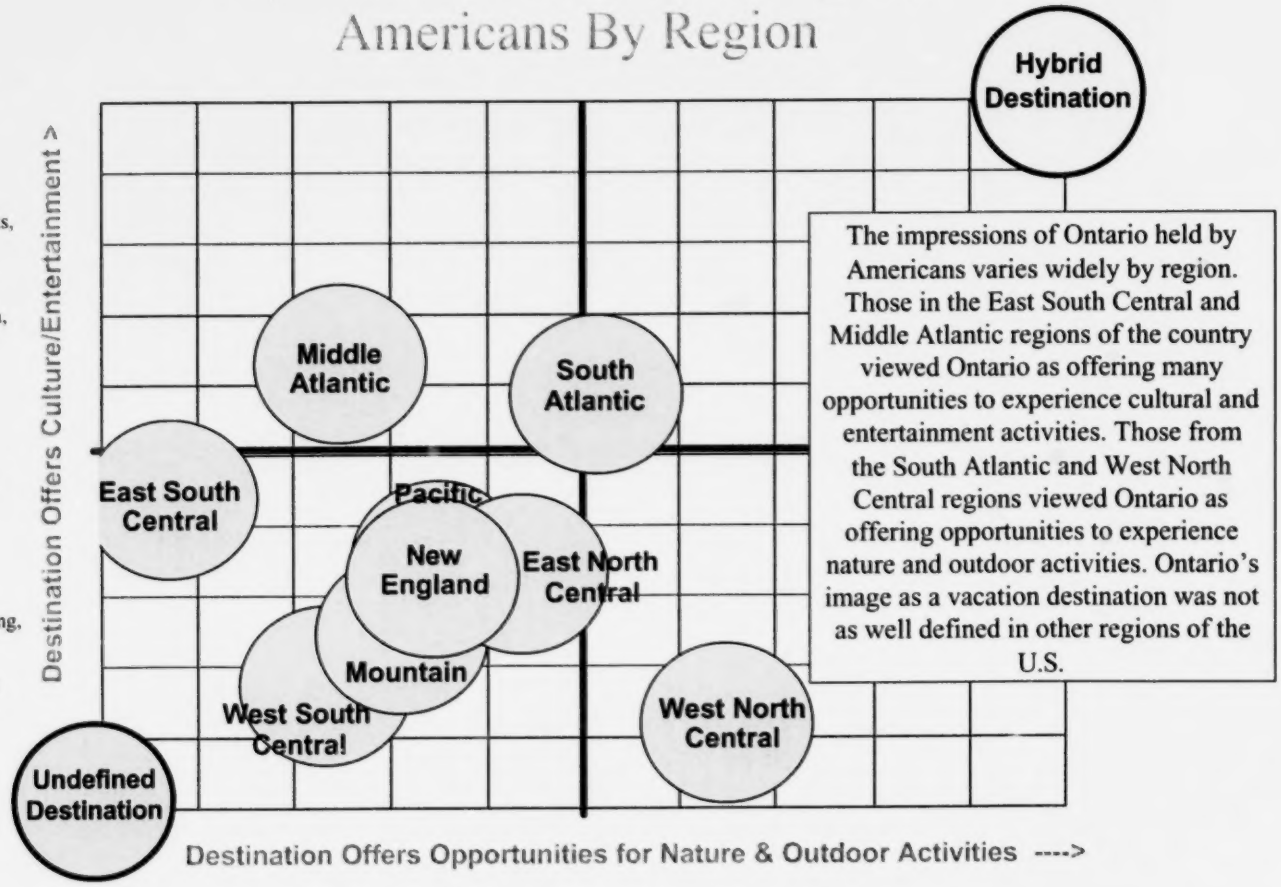
South Atlantic
Florida, Georgia, North Carolina, South Carolina

East South Central
Alabama, Mississippi, Tennessee, Kentucky

Mountain
New Mexico, Arizona, Utah, Colorado, Nevada, Idaho, Wyoming, Montana

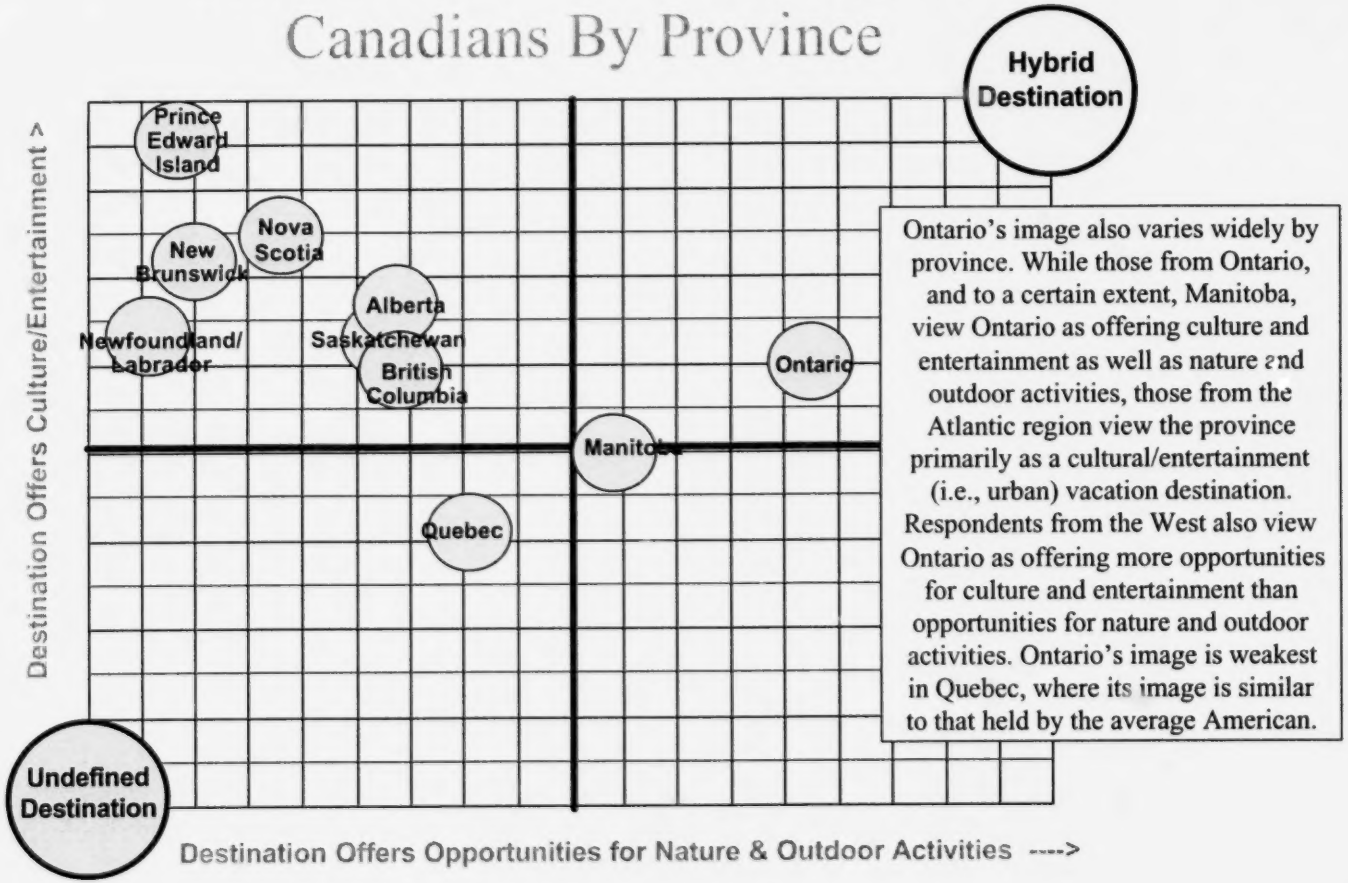
West South Central
Texas, Oklahoma, Arkansas, Louisiana

Pacific
California, Hawaii, Oregon, Washington, Alaska



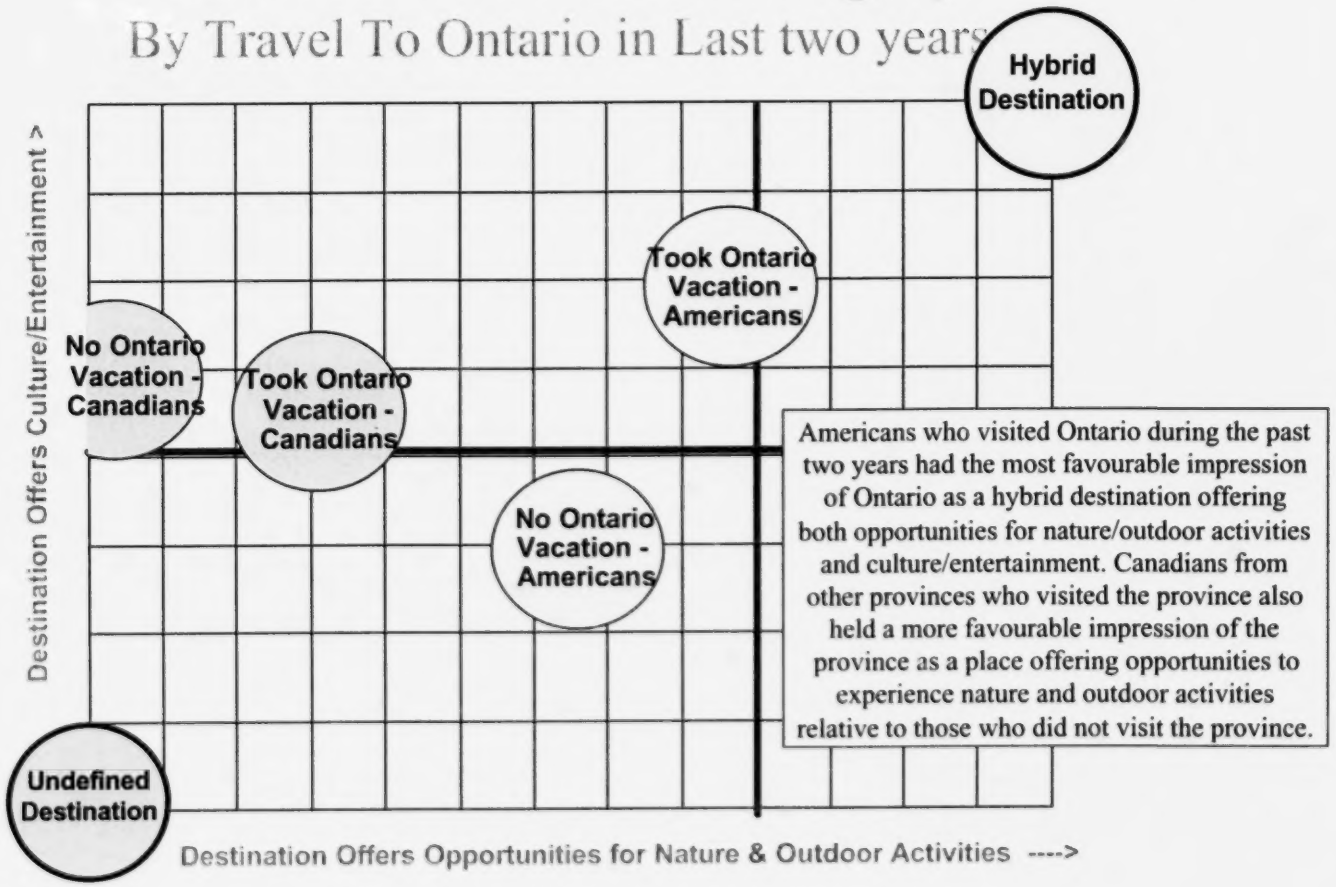
Ontario's Vacation Imagery

Canadians By Province



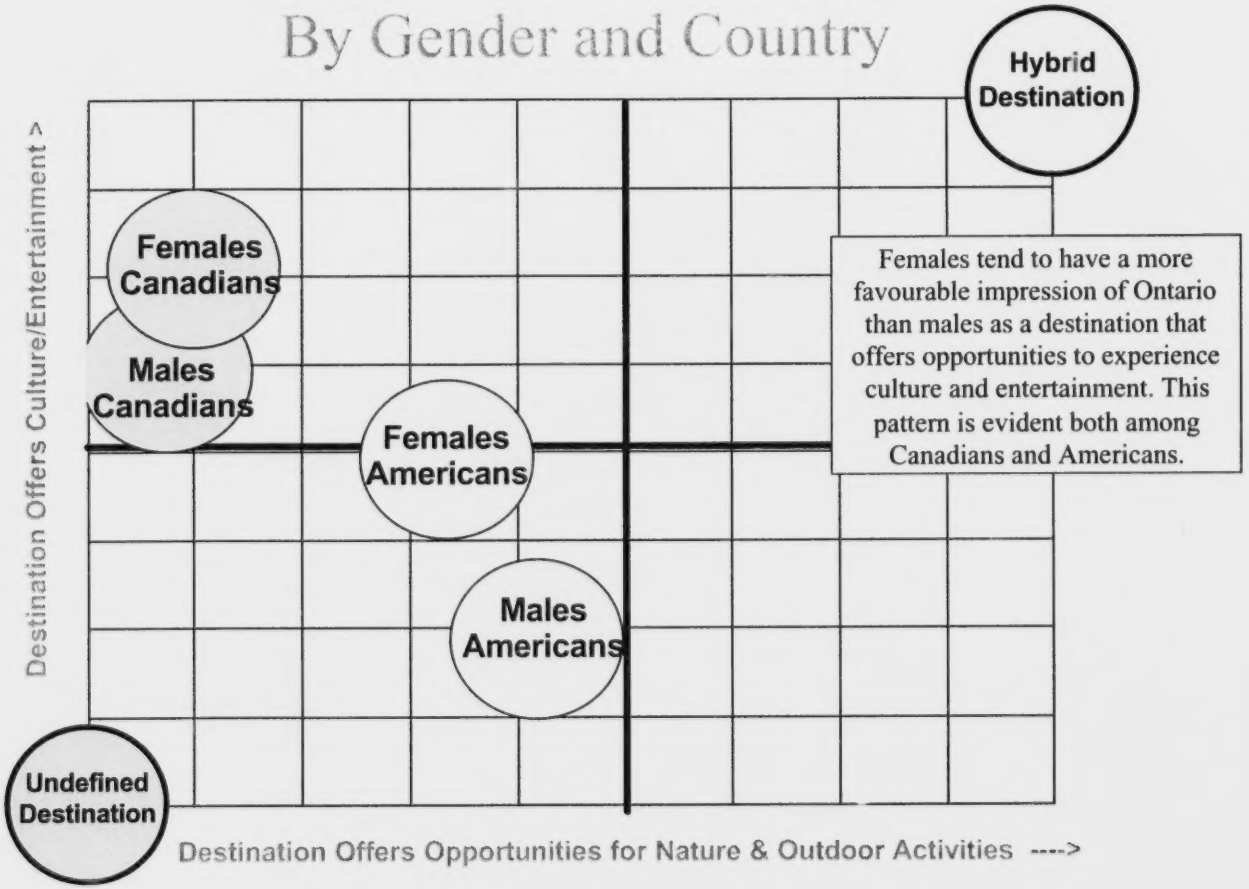
Ontario's Vacation Imagery

By Travel To Ontario in Last two years

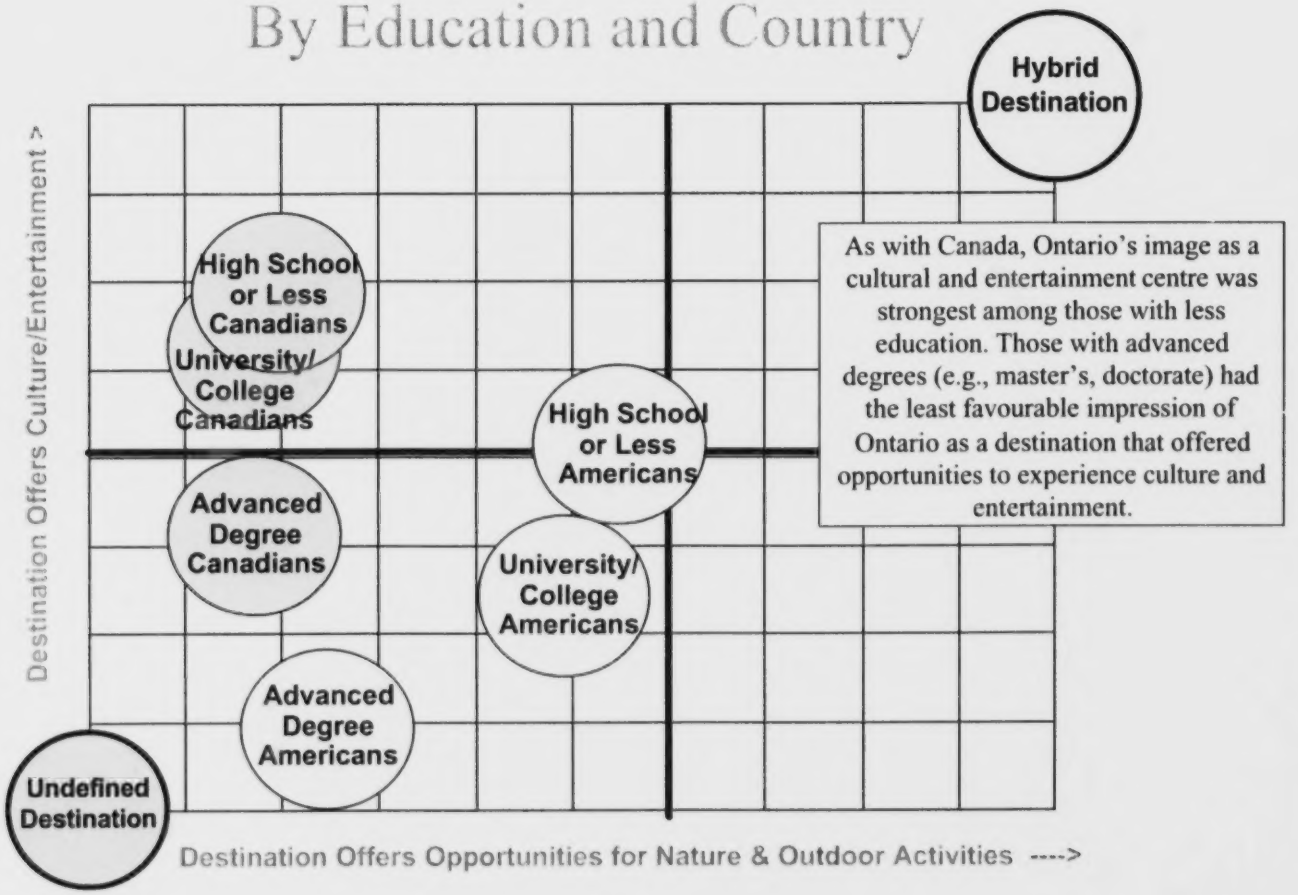


Americans who visited Ontario during the past two years had the most favourable impression of Ontario as a hybrid destination offering both opportunities for nature/outdoor activities and culture/entertainment. Canadians from other provinces who visited the province also held a more favourable impression of the province as a place offering opportunities to experience nature and outdoor activities relative to those who did not visit the province.

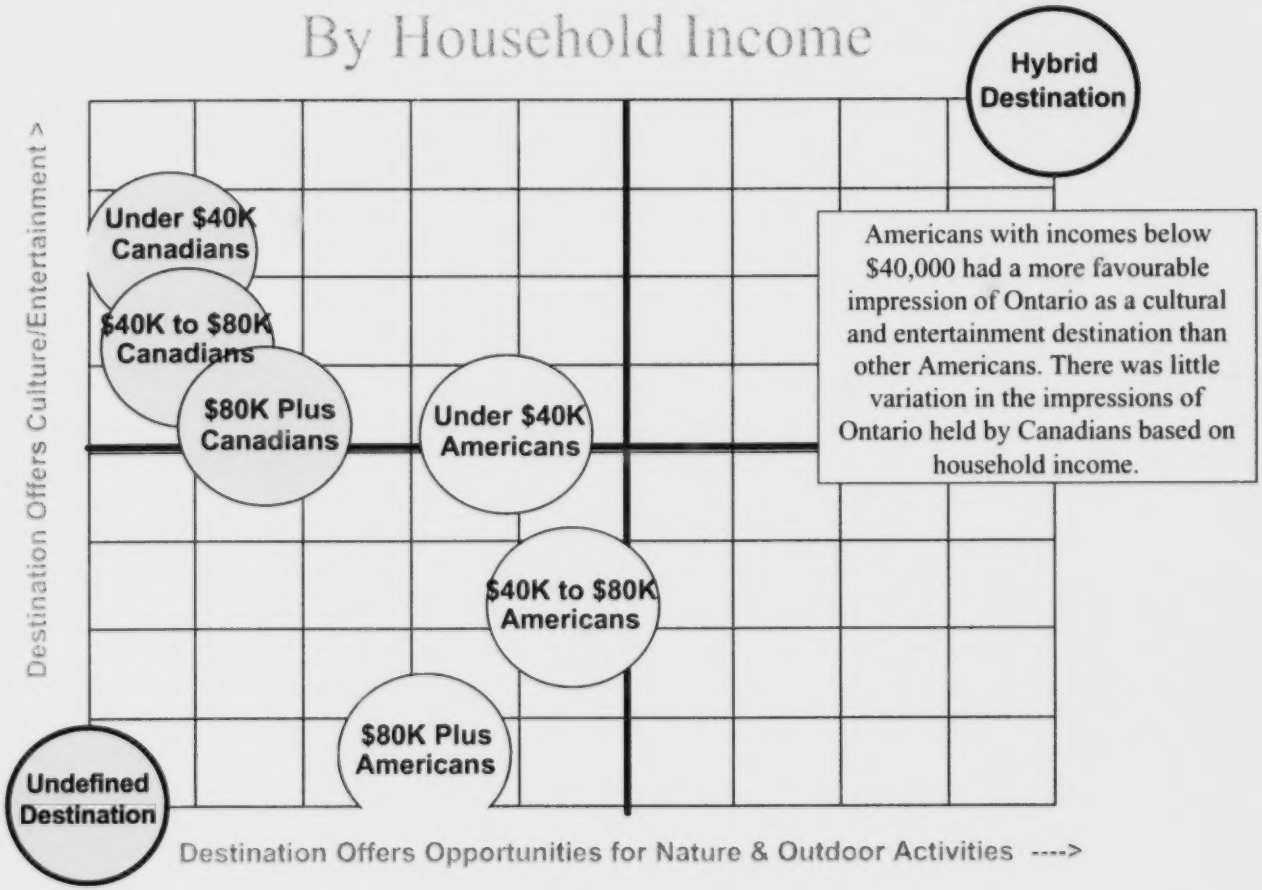
Ontario's Vacation Imagery
By Gender and Country



Ontario's Vacation Imagery
By Education and Country



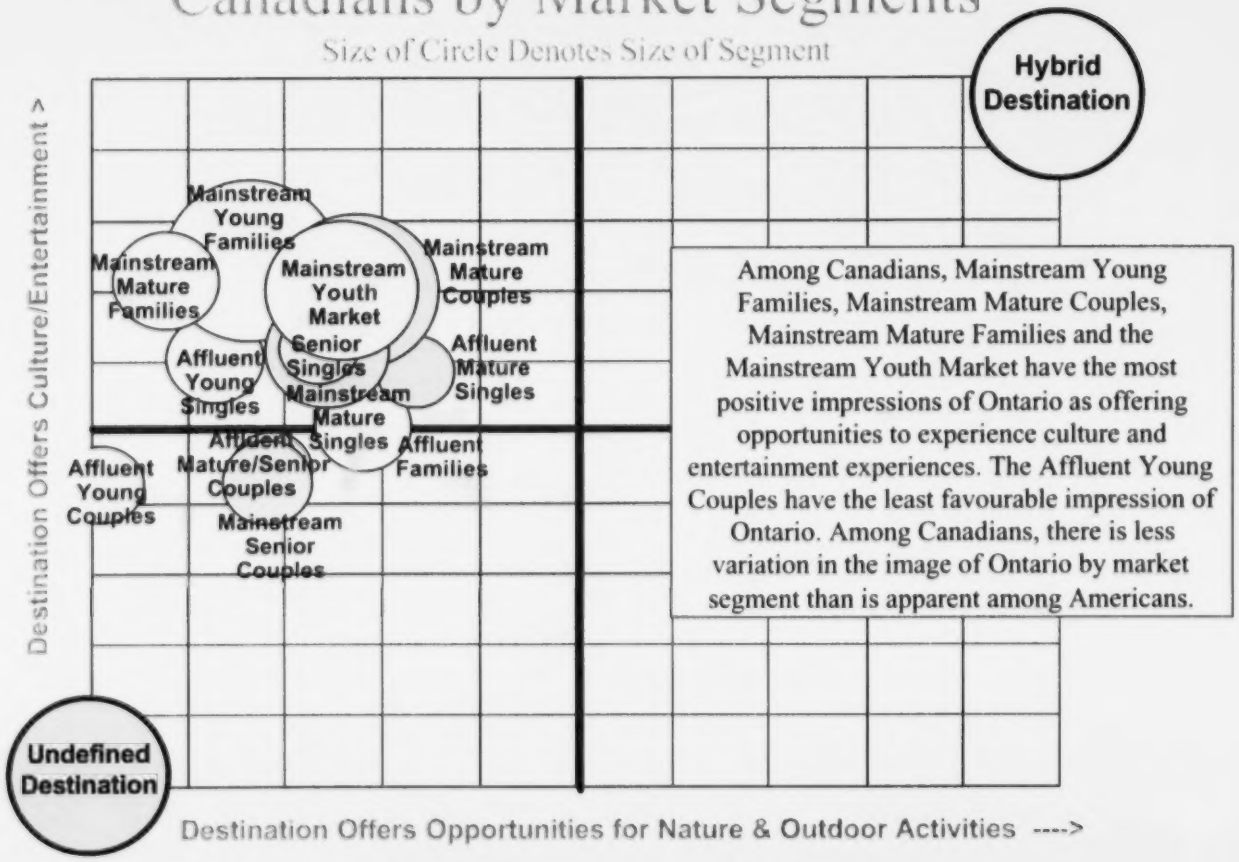
Ontario's Vacation Imagery
By Household Income



Ontario's Vacation Imagery

Canadians by Market Segments

Size of Circle Denotes Size of Segment

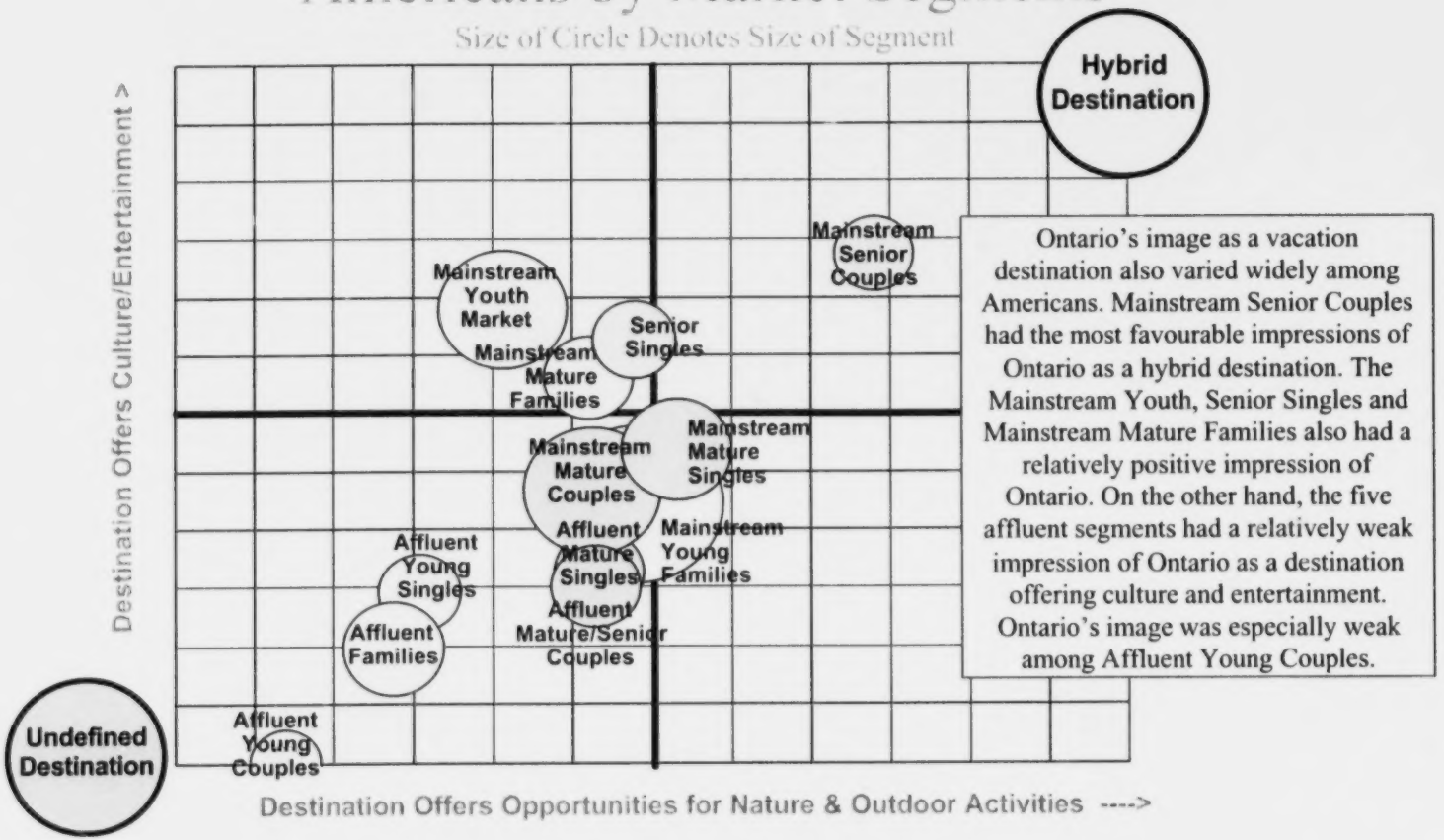


Among Canadians, Mainstream Young Families, Mainstream Mature Couples, Mainstream Mature Families and the Mainstream Youth Market have the most positive impressions of Ontario as offering opportunities to experience culture and entertainment experiences. The Affluent Young Couples have the least favourable impression of Ontario. Among Canadians, there is less variation in the image of Ontario by market segment than is apparent among Americans.

Ontario's Vacation Imagery

Americans by Market Segments

Size of Circle Denotes Size of Segment



Ontario's image as a vacation destination also varied widely among Americans. Mainstream Senior Couples had the most favourable impressions of Ontario as a hybrid destination. The Mainstream Youth, Senior Singles and Mainstream Mature Families also had a relatively positive impression of Ontario. On the other hand, the five affluent segments had a relatively weak impression of Ontario as a destination offering culture and entertainment. Ontario's image was especially weak among Affluent Young Couples.

Section Twenty-One

New Tourism Attractions

New Tourism Attractions

- Key Findings -

Respondents were asked whether each of 16 tourism attractions would make them more interested in taking a trip to Ontario. Overall, the most appealing tourism attractions were an overnight train tour through natural terrain, overnight cruises on the Great Lakes, and games parks or reserves with wildlife viewing areas.

Americans were more likely to be motivated to take a trip to Ontario for nature-oriented attractions such as an overnight train tour through natural terrain, a games park or games reserve, Great Lakes cruises, and a forestry or mining attraction. They were also more likely to be motivated to take a trip to Ontario to see a Canadian aboriginal attraction and a heritage attraction, such as the Indian Museum. These sorts of attractions may be more distinctive from those available in the United States and are linked to impressions of Ontario as a place that offers opportunities to experience nature and the outdoors. As such, promoting these attractions may enhance existing impressions of the province.

Relative to Americans, Canadians were more likely to be motivated to travel to Ontario by the addition of new theme parks (e.g., science and technology, movie, children's). This may also reflect the fact that many Canadians from other provinces, and especially those from the Atlantic region, view Ontario as a cultural and entertainment centre rather than a place within Canada that is distinctly well suited to experiencing nature and participating in outdoor activities. As well, the abundance of well-known theme parks in the United States may make this sort of attraction less distinctive for Americans.

The types of tourism attractions considered appealing vary widely across the 12 market segments. For example, Young Affluent Singles and Young Affluent Couples found wine region tours and musical, film and cultural festivals to be more appealing than other segments; while Affluent Families and Mainstream Young Families were most likely to consider a trip to Ontario to visit theme parks. Affluent Mature Singles exhibited particular interest in music and film festivals, while Mainstream Mature Couples and Senior Singles were more likely to find aboriginal attractions to be more appealing. These differences underscore the need to market various tourism attractions strategically.

Since Ontario already possesses attractions that appeal to various types of travelers, those attractions which appeal the most should be promoted in order to increase their awareness of their existence, as well as the likelihood that Ontario will be considered a vacation destination.

New Tourism Attractions

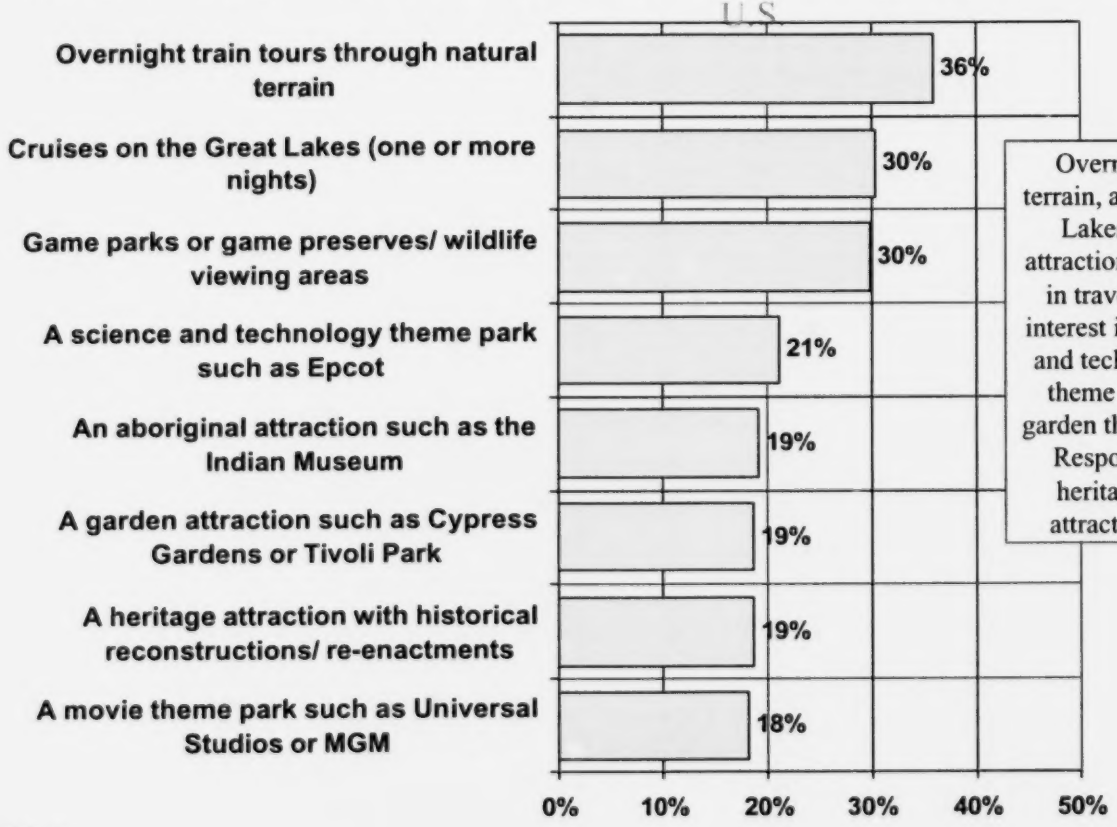
- Research Method -

In the final section of the mailback survey, respondents were asked whether each of 16 tourism attractions would make them "a lot more interested", "a little more interested" or have "no influence" on their decision to travel to Ontario. The new tourism attractions assessed in this exercise were as follows:

- A child-orientated amusement park such as Disneyland
- A movie theme park such as Universal Studios or MGM
- A musical attraction such as the Rock 'n Roll Museum, Heartland or Jazzland
- A cultural festival such as Mardi Gras
- A musical festival like the Montreal Jazz Festival or Chicago Blues Festival
- A film festival such as the Cannes film festival
- A heritage attraction with historical reconstructions & re-enactments such as Williamsburg
- A science and technology theme park such as Epcot
- A garden attraction such as Cypress Gardens or Tivoli Park
- An aboriginal attraction such as the Indian Museum of North America in Arizona or the Polynesian Cultural centre in Hawaii
- Cruises on the Great Lakes (one or more nights)
- A wine region such as the Napa Valley in California or Cote d'Or in France
- Forestry or mining attractions such as mine tours
- Game parks or game preserves/wildlife viewing areas such as Custer National Park
- Overnight train tours through natural terrain
- World class trophy fishing tournaments

New Tourism Attractions: Most Interesting Attractions
Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

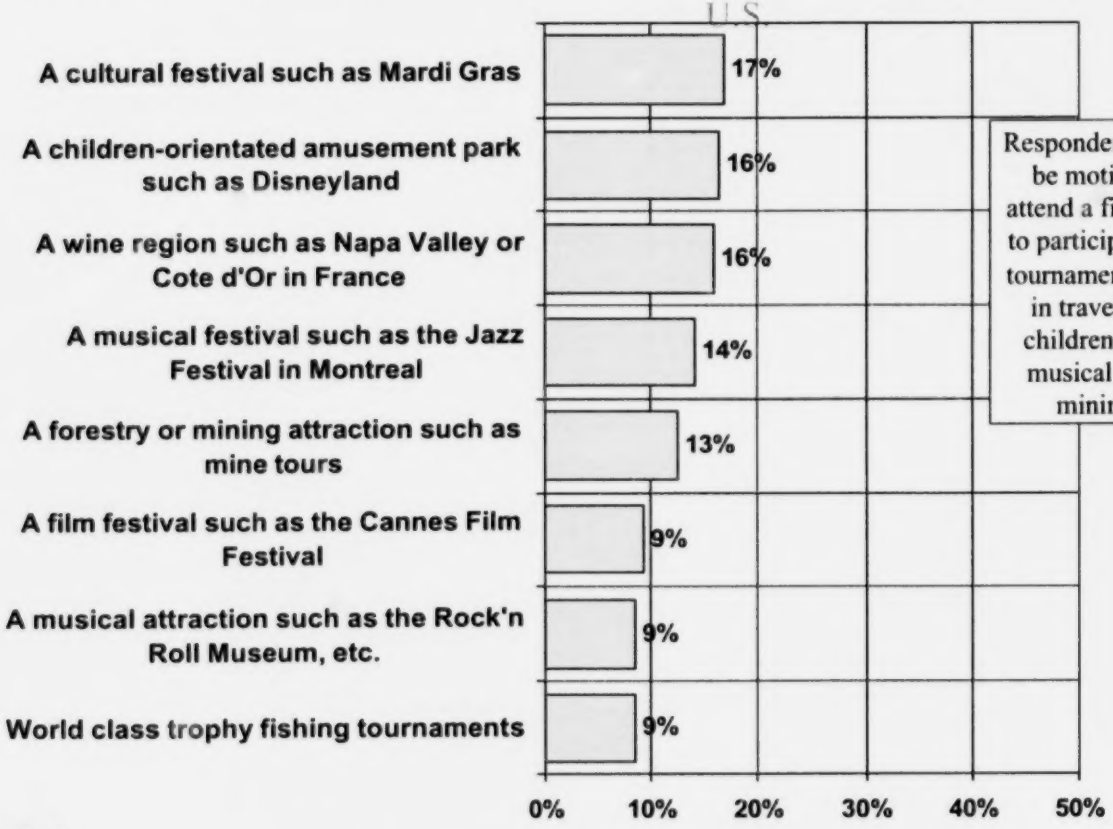
Base: Adult Population (18 Plus):Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Overnight train tours through natural terrain, a games park or reserve, and Great Lakes cruises were the new tourism attractions most likely to create an interest in traveling to Ontario. There was also interest in theme parks including a science and technology theme park, a children's theme park, a movie theme park and a garden theme park (like Cypress Gardens). Respondents were also interested in a heritage attraction, and an aboriginal attraction such as the Indian Museum.

New Tourism Attractions: Less Interesting Attractions
Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

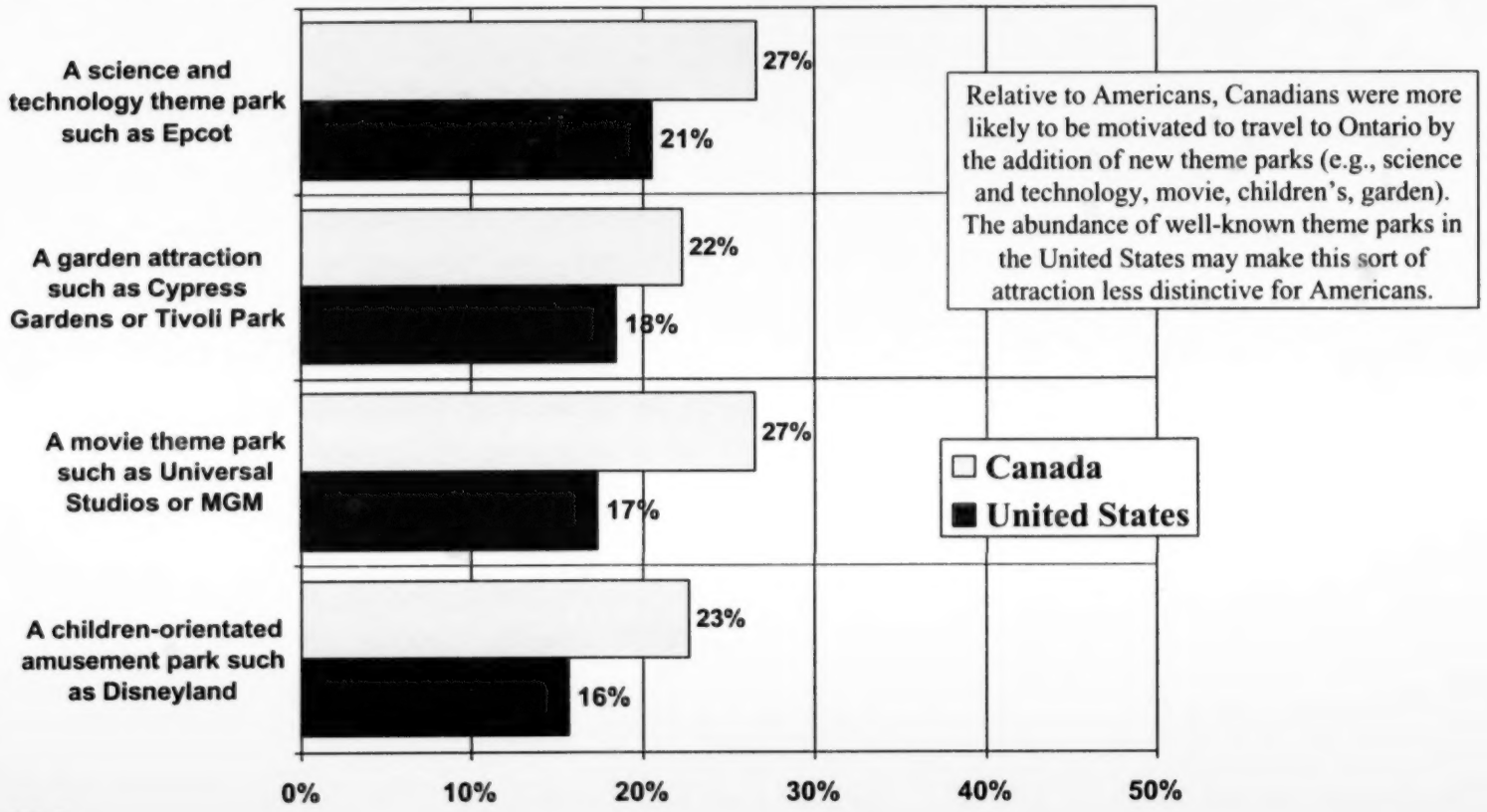
Base: Adult Population (18 Plus):Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Respondents felt that they were less likely to be motivated to take a trip to Ontario to attend a film festival or a musical festival or to participate in a world class trophy fishing tournament. Thy also expressed less interest in traveling to Ontario in order to visit a children-orientated amusement park, to a musical attraction, or to see a forestry or mining exhibit such as a mine tour.

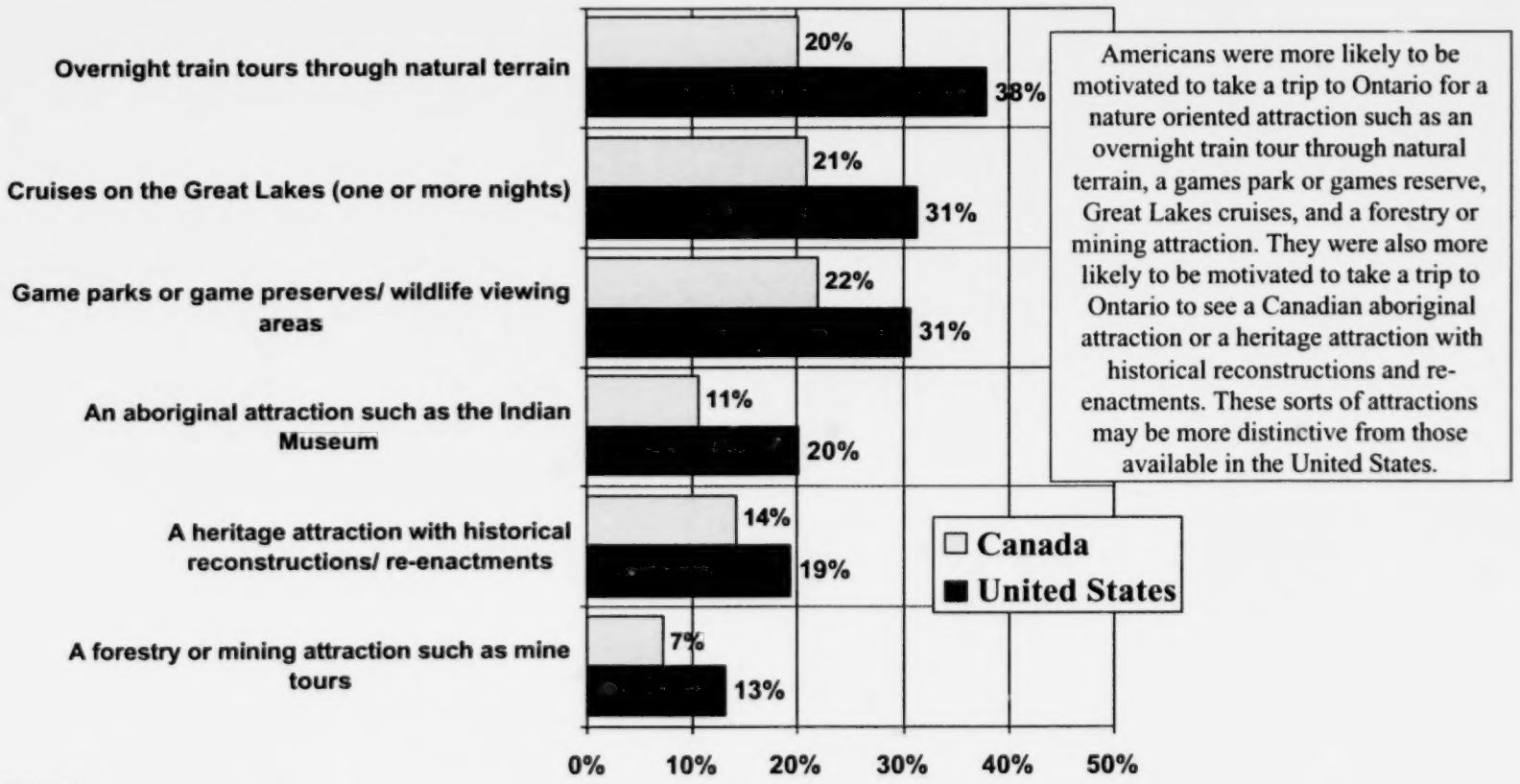
Percent Stating Attraction Would Make Them "A Lot More Interested" in Ontario Trip Attractions More Appealing to Canadians Than Americans

Base:Adult Population (18 Plus):Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Percent Stating Attraction Would Make Them " A Lot More Interested in" Ontario Trip Attractions More Appealing to Americas Than Canadians

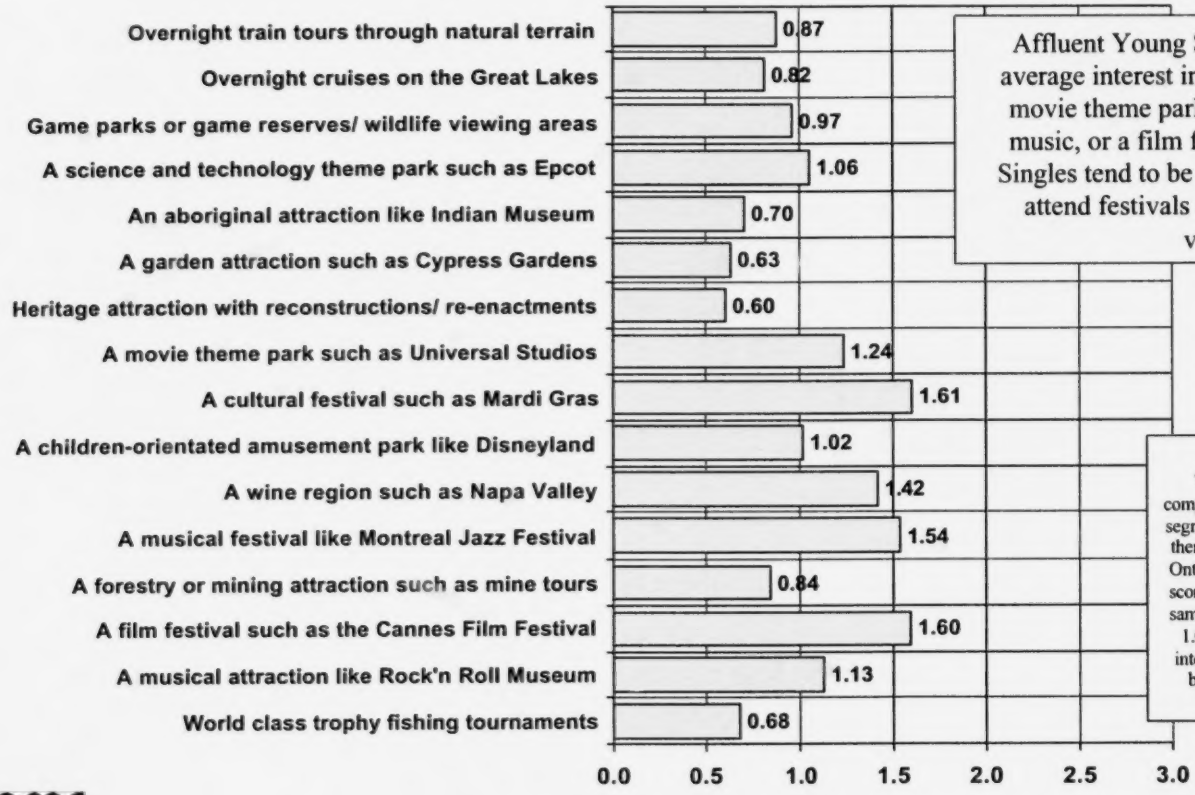
Base:Adult Population (18 Plus):Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Indexing the Appeal of New Tourism Attractions

Affluent Young Singles

Base:Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Affluent Young Singles exhibited above average interest in tours of wine regions, a movie theme park, a cultural festival and music, or a film festival. Affluent Young Singles tend to be among the most likely to attend festivals and carnivals while on vacation.

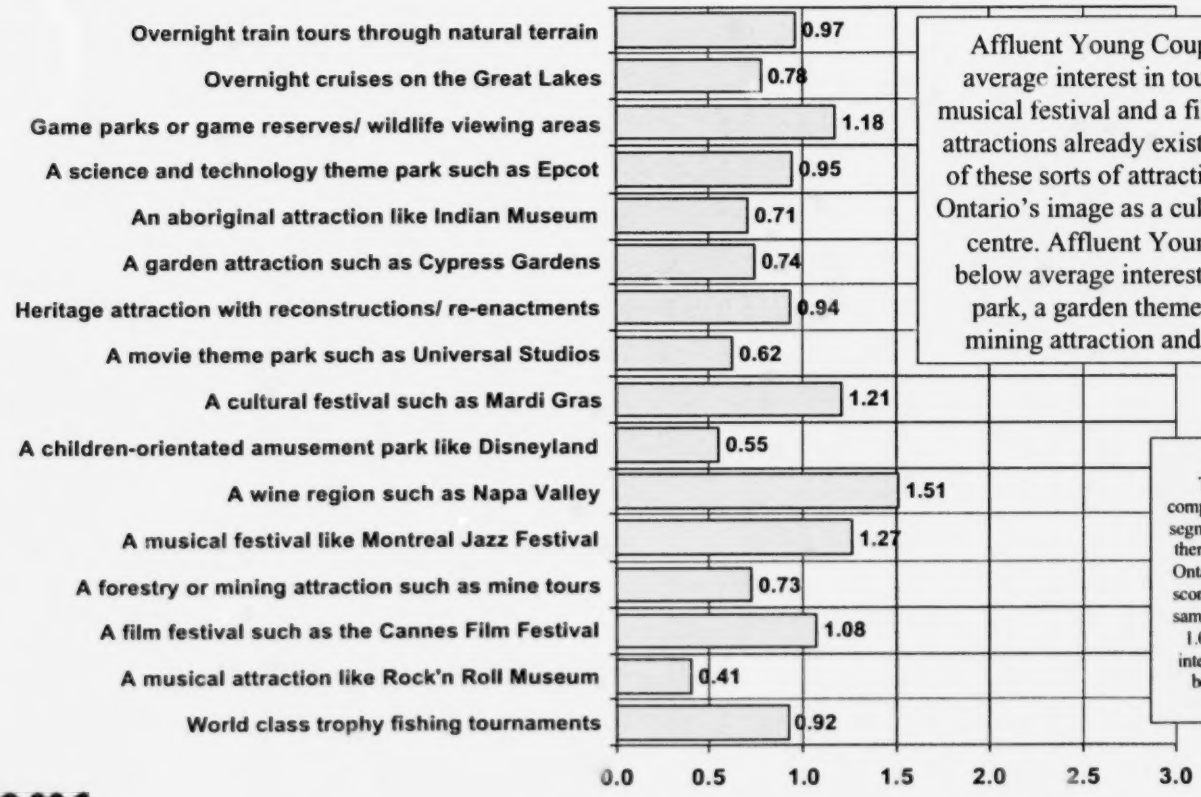
Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

Indexing the Appeal of New Tourism Attractions

Affluent Young Couples

Base:Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Affluent Young Couples exhibited above average interest in tours of wine regions, a musical festival and a film festival. Since these attractions already exist in Ontario, promotion of these sorts of attractions may help improve Ontario's image as a cultural and entertainment centre. Affluent Young Couples exhibited below average interest in a children's theme park, a garden theme park, a forestry and mining attraction and a musical attraction.

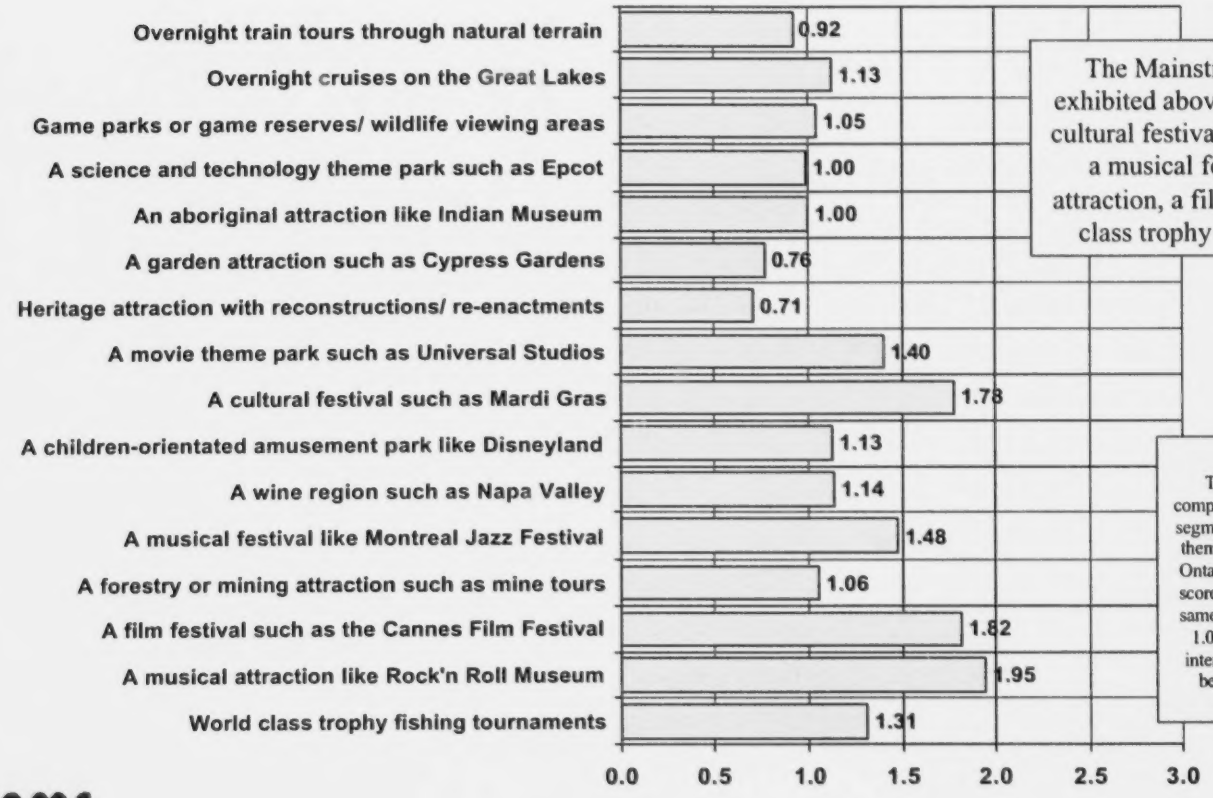
Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

Indexing the Appeal of New Tourism Attractions

Mainstream Youth Market

Base: Those Taking or Planning Trips Past/Next two years: Canada & U.S.



The Mainstream Youth Market exhibited above average interest in a cultural festival, a movie theme park, a musical festival or a musical attraction, a film festival and a world class trophy fishing tournament.

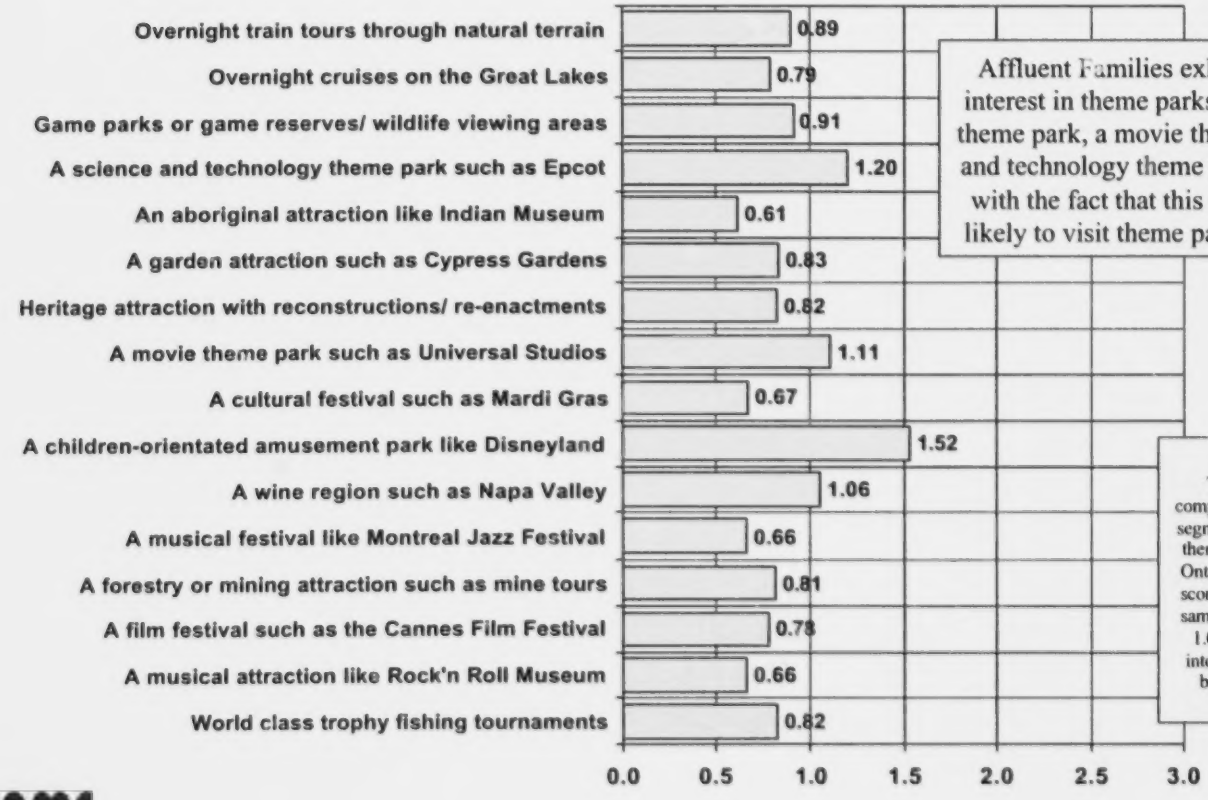
Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

Indexing the Appeal of New Tourism Attractions

Affluent Families

Base:Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Affluent Families exhibited above average interest in theme parks including a children's theme park, a movie theme park and a science and technology theme park. This is consistent with the fact that this segment was the most likely to visit theme parks while on vacation.

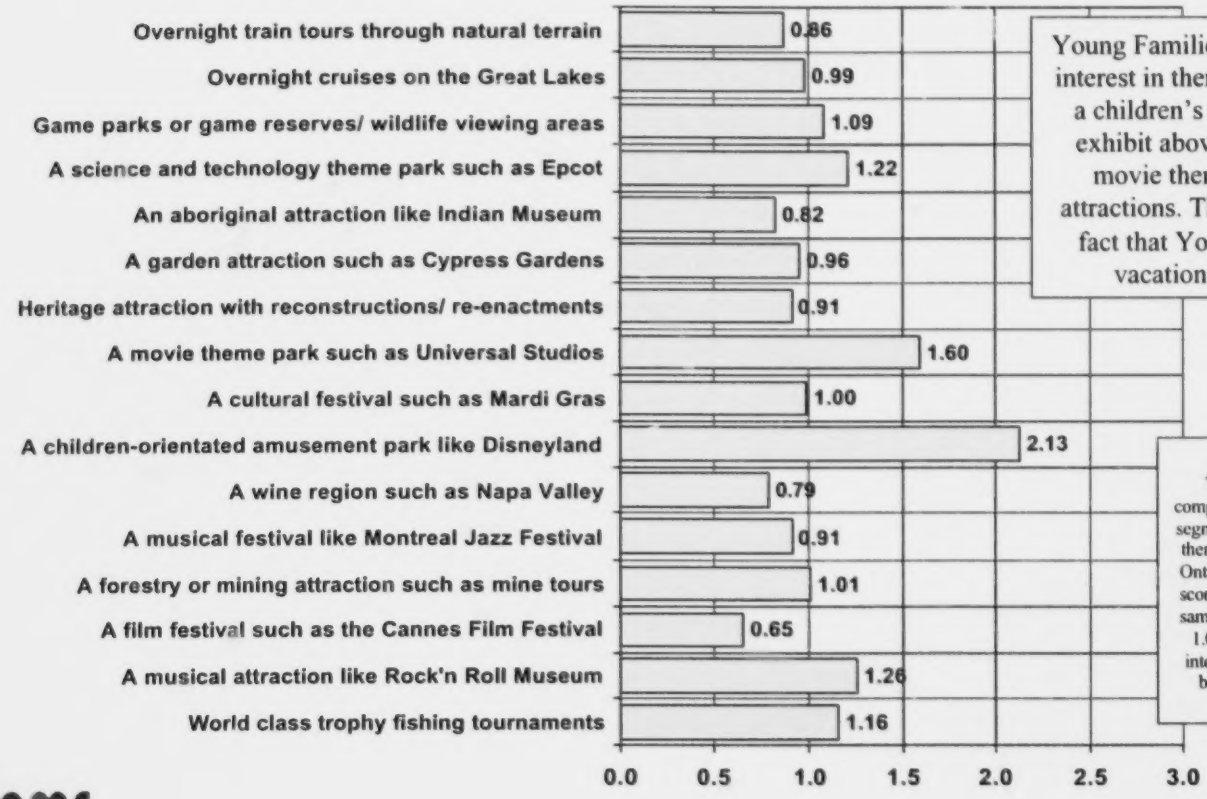
Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

Indexing the Appeal of New Tourism Attractions

Mainstream Young Families

Base:Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Young Families exhibit above average interest in theme parks, and especially a children's theme park. They also exhibit above average interest in a movie theme park, and musical attractions. These interests reflect the fact that Young Families typically vacation with their children

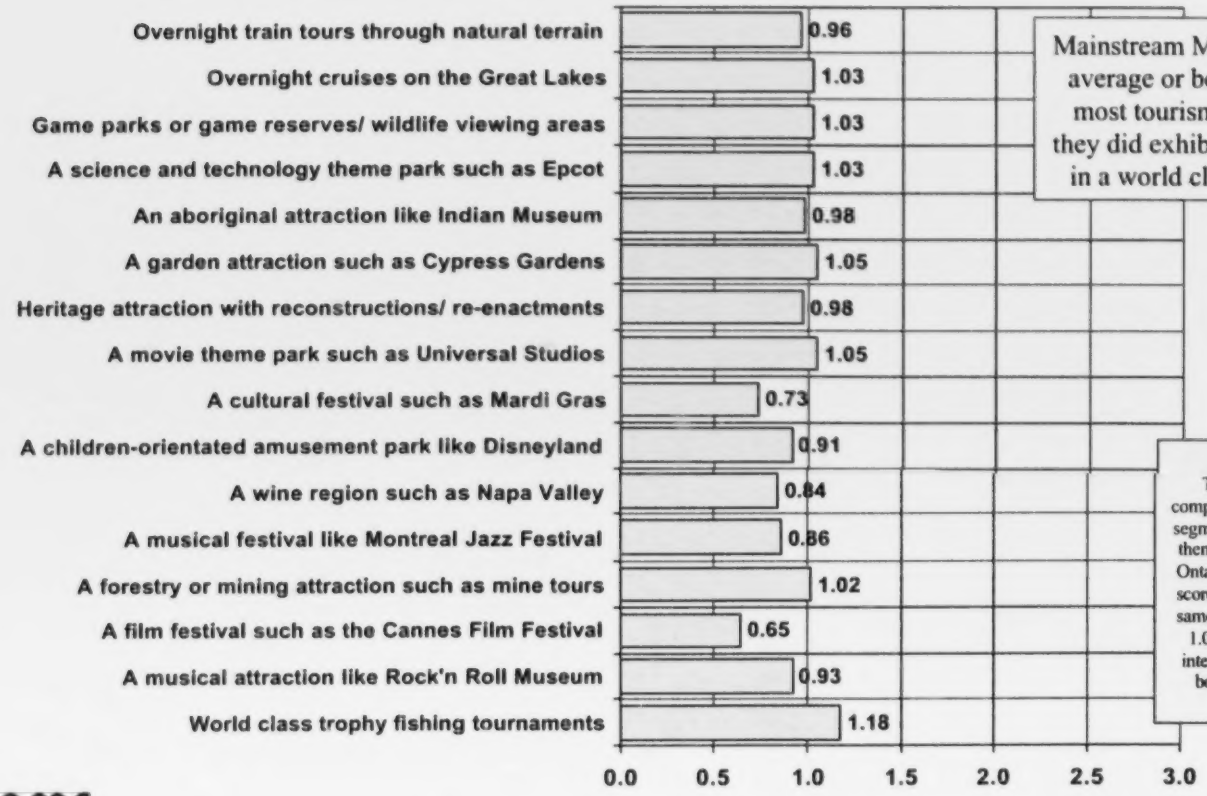
Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

Indexing the Appeal of New Tourism Attractions

Mainstream Mature Families

Base:Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Mainstream Mature Families exhibited average or below average interest in most tourism attractions. However, they did exhibit above average interest in a world class fishing tournament.

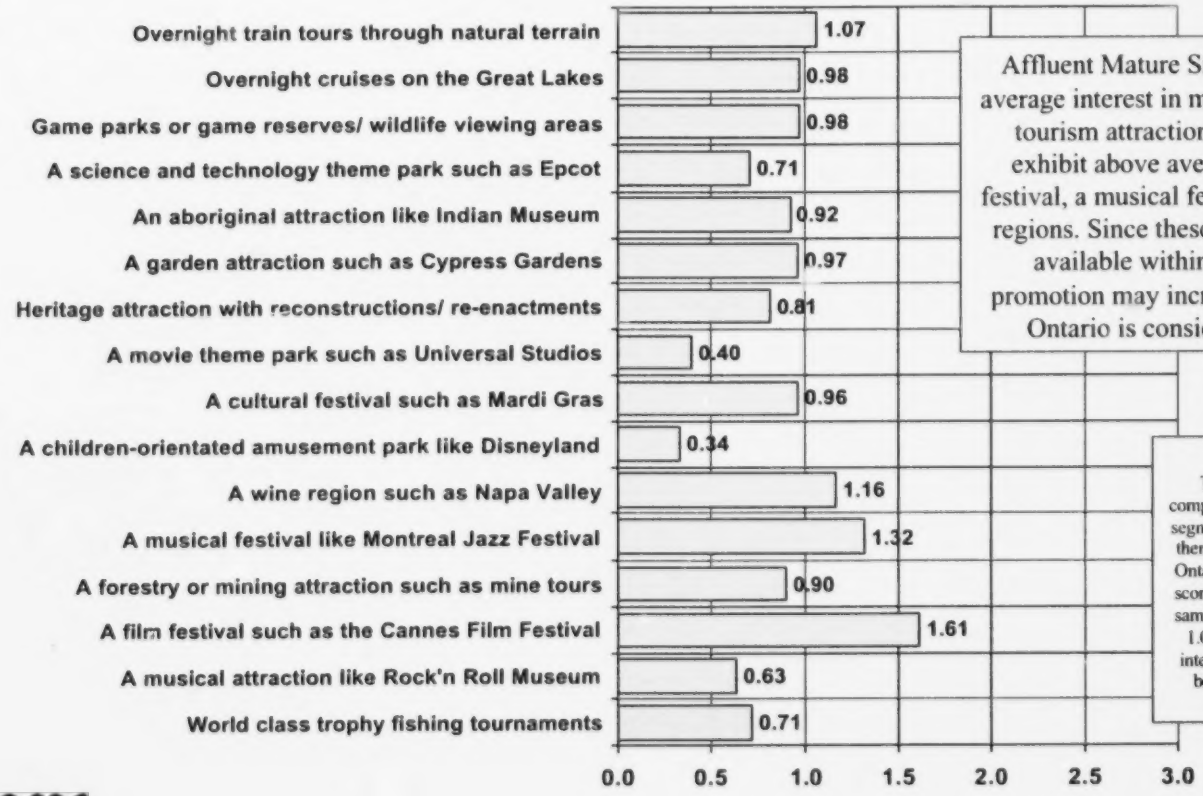
Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

Indexing the Appeal of New Tourism Attractions

Affluent Mature Singles

Base:Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Affluent Mature Singles exhibited below average interest in most of the proposed new tourism attractions. However, they did exhibit above average interest in a film festival, a musical festival, and tours of wine regions. Since these attractions are already available within the province, their promotion may increase the likelihood that Ontario is considered for a vacation.

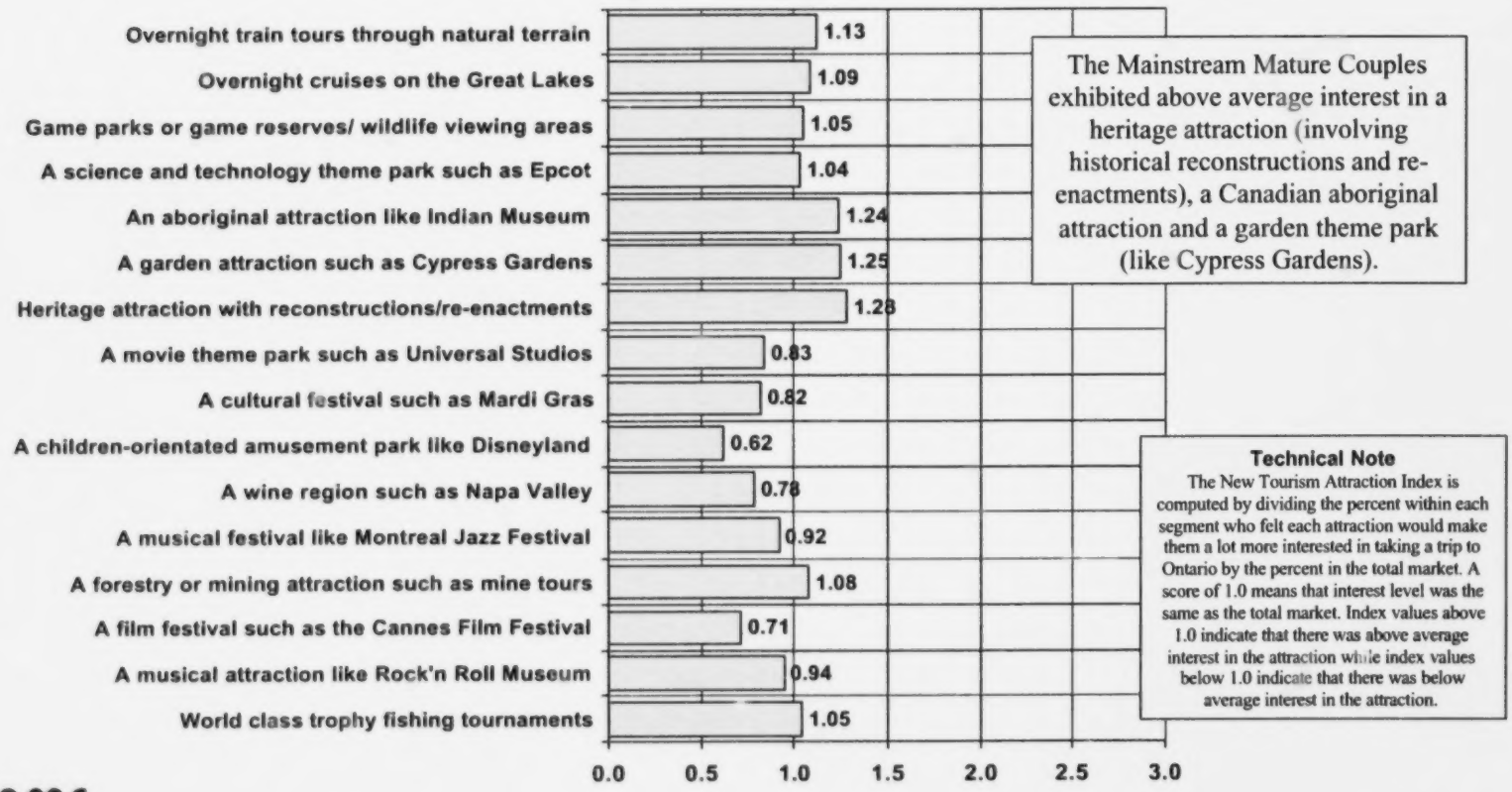
Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

Indexing the Appeal of New Tourism Attractions

Mainstream Mature Couples

Base:Those Taking or Planning Trips Past/Next two years: Canada & U.S.



The Mainstream Mature Couples exhibited above average interest in a heritage attraction (involving historical reconstructions and re-enactments), a Canadian aboriginal attraction and a garden theme park (like Cypress Gardens).

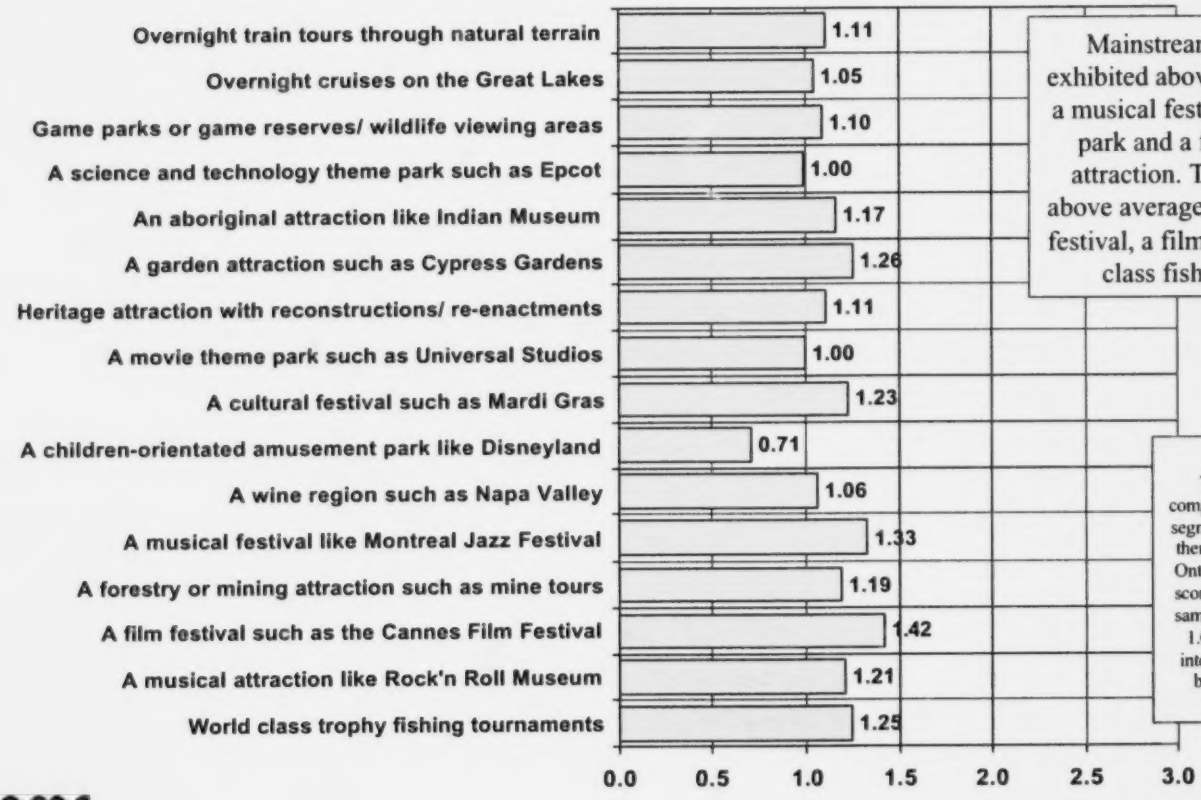
Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

Indexing the Appeal of New Tourism Attractions

Mainstream Mature Singles

Base:Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Mainstream Mature Singles exhibited above average interest in a musical festival, a garden theme park and a forestry or mining attraction. They also exhibited above average interest in a cultural festival, a film festival and a world class fishing tournament.

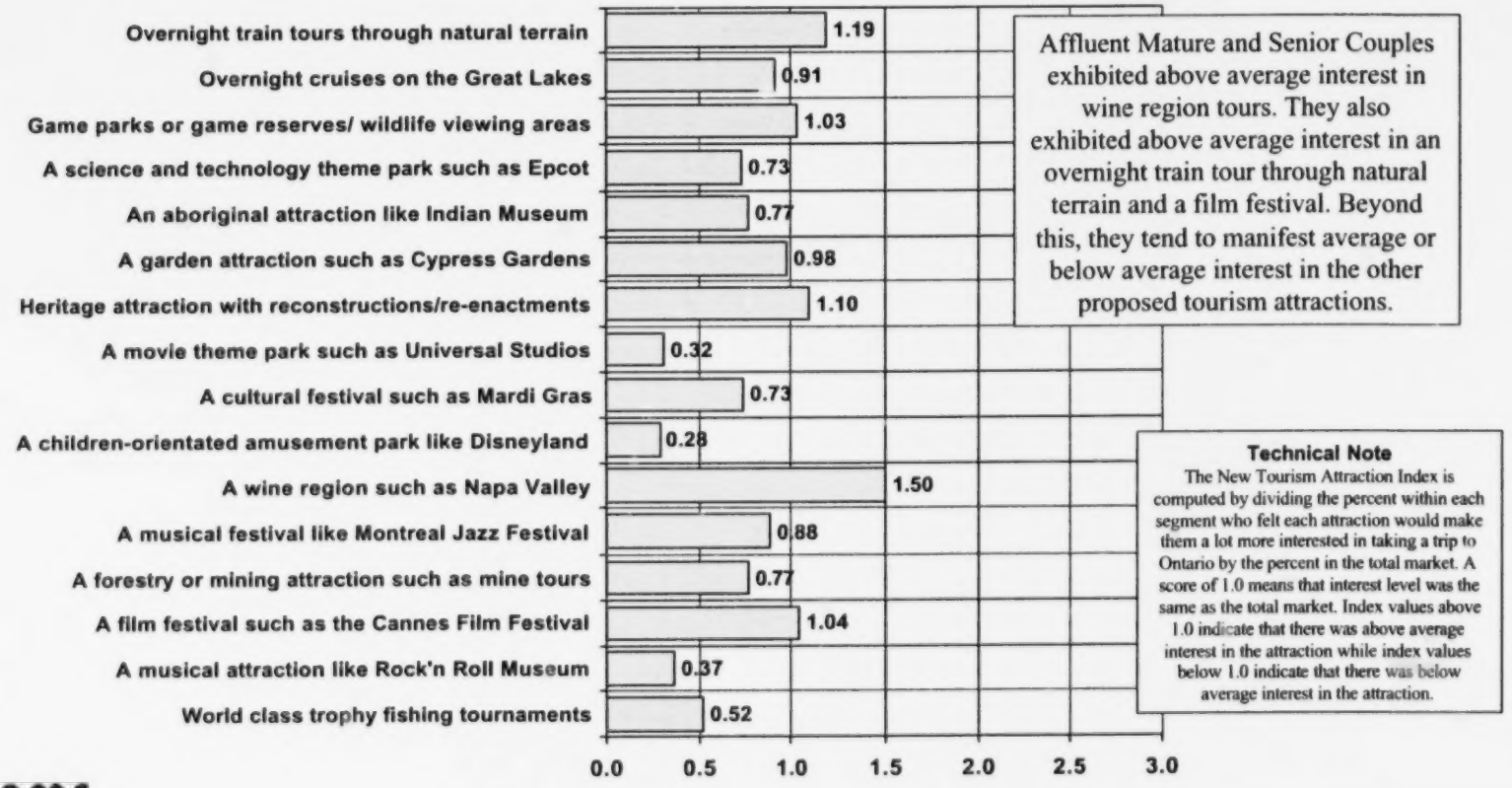
Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

Indexing the Appeal of New Tourism Attractions

Affluent Mature & Senior Couples

Base:Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Affluent Mature and Senior Couples exhibited above average interest in wine region tours. They also exhibited above average interest in an overnight train tour through natural terrain and a film festival. Beyond this, they tend to manifest average or below average interest in the other proposed tourism attractions.

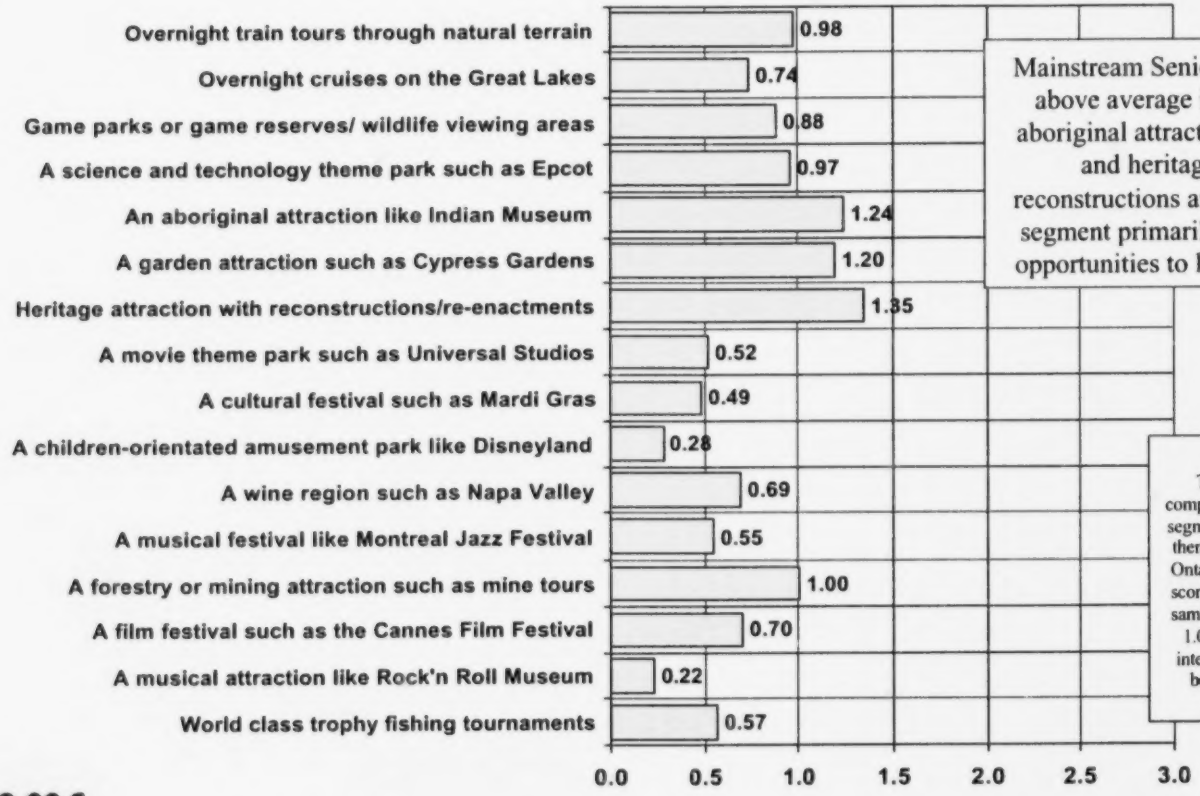
Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

Indexing the Appeal of New Tourism Attractions

Mainstream Senior Couples

Base: Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Mainstream Senior Couples exhibited an above average interest in a Canadian aboriginal attraction, a garden attraction and heritage attraction (with reconstructions and re-enactments). This segment primarily appears interested in opportunities to learn while on vacation.

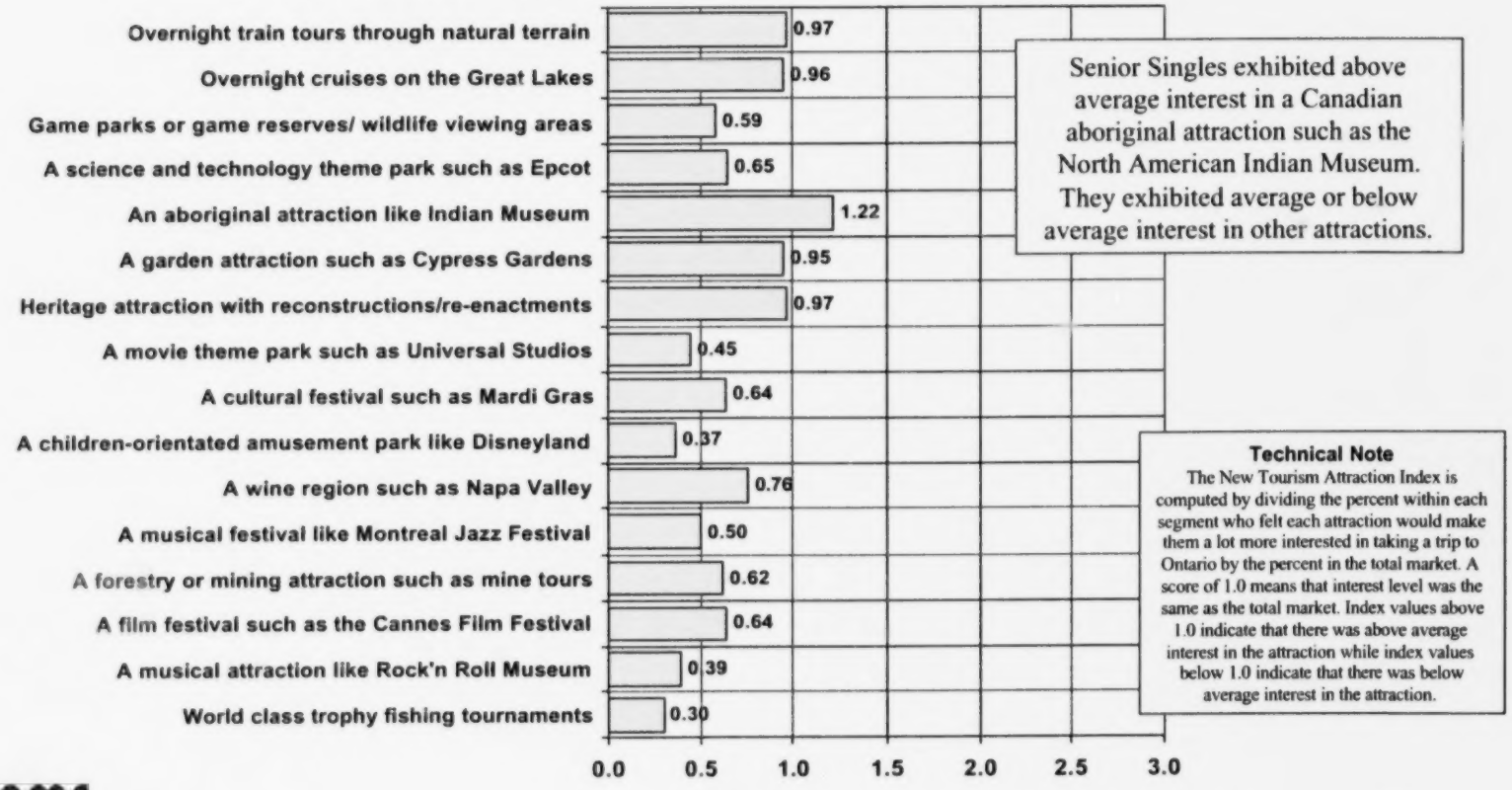
Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

Indexing the Appeal of New Tourism Attractions

Senior Singles

Base:Those Taking or Planning Trips Past/Next two years: Canada & U.S.



Senior Singles exhibited above average interest in a Canadian aboriginal attraction such as the North American Indian Museum. They exhibited average or below average interest in other attractions.

Technical Note

The New Tourism Attraction Index is computed by dividing the percent within each segment who felt each attraction would make them a lot more interested in taking a trip to Ontario by the percent in the total market. A score of 1.0 means that interest level was the same as the total market. Index values above 1.0 indicate that there was above average interest in the attraction while index values below 1.0 indicate that there was below average interest in the attraction.

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Atlantic Tourism Partnership

Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade & Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food and Rural Affairs

Ontario Ministry of Tourism, Culture & Recreation

Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

Tourism B.C.

Tourism Toronto

Yukon Government Department of Tourism

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TAMS
Travel Activities & Motivation Survey

Lang

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Prepared by:

Lang Research Inc.

on behalf of

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Manitoba Ministry of Industry, Trade & Tourism

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Travel Activities & Motivation Survey

Overview Report

- Key Findings -

Overall Travel Patterns

Americans travel to a greater number of destinations than Canadians. This is due to a much higher incidence of interstate travel by Americans, relative to interprovincial travel by Canadians. Canadians are 253 % more likely to have taken a trip to the U.S. than Americans to have taken a trip to Canada (33 % vs. 13 %). As such, Canadians have a north-south orientation to their travel patterns, while Americans have an east-west orientation. Travel activity levels rise with the education level and household income of the individual. This is especially true for international travel.

While pleasure travel is more frequent during the summer season in both Canada and the United States, Americans are more likely to travel during the spring and fall seasons. The Affluent Sectors, and especially the Affluent Mature and Senior Couples, are prime markets for shoulder season travel. However, during the summer season, the difference between the segments is diminished, and given their sheer size, Mainstream Young Families, Mainstream Mature Families and Mainstream Mature Couples increase in strategic importance.

Travel to Canada from the United States

13.1 % of United States residents (18 Plus) have taken at least one overnight pleasure trip to Canada during the last two years. The most frequently visited provinces were Ontario (7.2 % of Americans visiting at least one time), British Columbia (4.0 %) and Quebec (3.3 %). The U.S. markets with the highest incidence of travel to Canada are primarily situated along the Canadian border and include urban centres such as Rochester, Seattle, Buffalo, Detroit, Cleveland and Toledo. However, Detroit, Boston, Chicago, New York City and Seattle are the urban centres which generate the largest number of trips to Canada. Proximity dictates the prime markets for each province.

Travel to Canada is primarily concentrated in the summer months with 7.8 % of U.S. residents taking at least one summer trip to Canada in the last two years. Travel to Canada is slightly higher (4.4 %) during the fall than the spring (3.5 %) and winter (3.0 %) travel seasons. As with travel patterns in general, travel to Canada increased with the education level of the respondent and the household income. This was especially the case for business travel.

Travel Activities & Motivation Survey

Overview Report: Key Findings (Continued)

Travel within Canada By Canadians

On average, Canadian residents took 4.0 intra-provincial pleasure trips and 1.7 inter-provincial pleasure trips during the last two years. The percent of domestic pleasure trips that were intra-provincial (relative to the percent that were inter-provincial) was highest for the larger and most populous provinces, that is Ontario, Quebec and British Columbia. In the Maritime region and in Manitoba and Saskatchewan, the number of intra-provincial trips was comparable to the number of inter-provincial trips. Ontario, Quebec, Alberta and British Columbia were the provinces most often traveled to by inter-provincial pleasure travelers. Typically, the highest incidence of travel was from the adjacent province(s) although there were certain exceptions to this pattern (e.g., trips from Alberta to Newfoundland were atypically high).

As with long haul travel from the U.S. to Canada, inter-provincial pleasure travel was more concentrated during the summer than intra-provincial travel. This suggests that the intra-provincial market has greater strategic importance during the winter, spring and fall, while inter-provincial travel is strategically important during the summer.

Intentions to Travel within or to Canada During the Next Two Years

65.4 % of the residents of Canada and 29.2 % of the residents of the United States expect to take a pleasure trip to Canada during the next two years. The percent of Canada's residents with travel plans is comparable to the actual number who took a domestic vacation during the past two years (65.4 % with intentions versus 59.8 % who took trips). However, U.S. residents were 222 % more likely to express intentions to travel to Canada than to have taken a trip to Canada in the last two years (29.2 % with intentions versus 13.1 % who took trips).

Those Who Do Not Travel

15.7 % of the North American market did not take an overnight trip (for any purpose) in the past two years and do not plan to take a pleasure trip in the next two years. 8.0 % took an overnight trip in the past two years, but do not have intentions to take an overnight trip in the next two years. 7.0 % did not take an overnight trip in the past two years, but plan to take an overnight trip in the next two years. The incidence of "Non-travelers" increased with the age of the respondent and was highest among households with incomes below $40,000. The primary reason for not traveling was that it was perceived to "cost too much" (41 %). Other common reasons for not traveling include "do not get enough time off work", "too old to travel", "illness or infirmity" and "everything I need is in place where I live".

Overview Report: Key Findings (Continued)

Day-to-Day Activities While Not On Vacation and Vacation Activities

The strongest association between day-to-day outdoor activities and those pursued while on vacation were fishing, hunting, canoeing and kayaking. The strongest association between everyday fitness and sports activities and those participated in while on vacation include golf, downhill skiing, tennis, snowmobiling and cross-country skiing. All of these activities require a certain amount of skill and special equipment.

There was a comparatively weak association between the types of entertainment pursued while not on vacation and those activities undertaken while on vacation. This suggests that the pursuit of various forms of entertainment sought while on vacations are different from those sought day-to-day. As well, there was a relatively weak association between the types of cultural activities sought while on vacation and those sought while not on vacation. Exceptions to this trend are noted for the fine arts (e.g., ballet, opera) and live theatre.

Media Consumption Patterns and Travel

Readership of the travel section of the daily newspaper was strongly associated with the number of pleasure trips taken in the past two years. Frequent travelers were also more likely to read news magazines (e.g., Macleans, Time), travel magazines, National Geographic and general interest magazines. These print media channels represent efficient methods by which to reach frequent travelers. The relationship between the frequency of pleasure trips and television viewing preferences was weaker than that observed for print media. However, frequent travelers were more likely to watch professional sports and news magazine shows and unlikely to watch daytime television.

Use of the Internet

47.0 % of the U.S. population (18 plus) and 37.6 % of the Canadian population (18 plus) report using the Internet on a regular basis as a source of information (not just travel information). Use of the Internet as an information source was strongly associated with the frequency with which pleasure trips were taken during the last two years. Thus, 63 % of those who had taken 10 or more pleasure trips during the past two years use the Internet, while only 28 % use the Internet regularly of those who did not take a pleasure trip. Use of the internet as an information source increased sharply with increases in the education level of the respondent and the overall household income. 13.3 % of the North American population (18 plus) have booked a pleasure trip through the Internet. Americans were almost three times as likely to have booked a trip through the Internet (14.2 %) than were Canadians (5.2 %).

Overview Report: Key Findings (Continued)

Association Membership and Pleasure Travel

There was a strong positive correlation between the frequency of pleasure travel and the likelihood of membership in an association. The correlation was especially strong between memberships in art galleries, museums and nature organizations and the frequency of pleasure trips. The correlation was also relatively strong between membership in automotive associations and sports clubs and the frequency of pleasure travel during the past two years. The positive correlation between association membership and pleasure travel suggests that the magazines and newsletters distributed by such associations represent an efficient media channel by which to promote various tourism destinations.

Attendance at Travel-Related trade show s

About one-third of U.S. and Canadian adults 18 years or older have attended at least one travel-related trade show in the last two years. Attendance at travel-related trade shows was strongly associated with the number of pleasure trips taken in the last two years. This association was stronger with the number of domestic trips taken than with the number of trips taken to other countries, suggesting that travel-related trade shows, and especially those which feature outdoor vacations and activities (e.g., RV Campers, boat shows, sportsmen shows) may appeal more to those who prefer shorter-haul travel.

Vacation Experiences Sought

The most commonly sought experiences while on vacation were rest and relaxation, and socializing with one's spouse or partner, family members, friends and relatives. This indicates that pleasure trips offer opportunities to recuperate from the stresses and demands of daily life, to renew the social bonds and enjoy the company of loved ones. Vacations are also frequently undertaken to see and experience natural wonders, historical sites, different and distinctive cultures and unspoiled nature. This illustrates that vacations permit opportunities to experience novel settings which are different from one's day-to-day experiences. The pursuit of exploratory vacation experiences tends to be more common as the education level and household income of the respondent increases. Vacations were less frequently undertaken to indulge and pamper oneself. Thus, respondents were less likely to have taken pleasure trips to experience "the good life"(e.g., fine cuisine, pamper oneself), visit casinos, experience city life (e.g., shopping, nightlife) or visit a trendy, popular place. However, this sort of vacation experience clearly appeals to younger travelers. Vacations that provide opportunities to learn or improve oneself through educational, hands-on experiences were also more likely to be sought out by younger single travelers.

Overview Report: Key Findings (Continued)

Outdoor Vacation Activities

The most frequently undertaken outdoor activities while on a trip were those that were less strenuous and less expensive, such as going for picnics in park settings, sunbathing or sitting on a beach, swimming and viewing wildlife, wildflowers and flora. These outdoor activities may be enjoyed by individuals of all ages regardless of their physical conditioning or financial circumstances. Fishing and golfing were the most frequently undertaken sports activities with 26 % of the travelers fishing in fresh water, and 20 % playing an occasional game of golf while on a trip. Hiking and backpacking, working out in fitness centres or jogging, recreational biking, and canoeing and kayaking were also among the more common outdoor activities sought during a trip.

Outdoor activities which are more strenuous (e.g.,competitive sports such as baseball, rock climbing, hang gliding, snowboarding) were generally confined to younger vacationers (34 and under) with participation rates declining sharply as a function of age. However, not all strenuous activities exhibit this age trend. For example, downhill skiing, sailing and motorcycling were often pursued by more mature travelers.

Culture and Entertainment Vacation Activities

Travelers were more likely to have participated in cultural and entertainment activities than outdoor activities during the past two years. Dining, shopping and leisure reading were the most frequently pursued forms of entertainment while traveling. Going to movies, visiting museums, art galleries and zoos, attending local festivals or fairs, and seeing natural wonders were also frequent cultural and entertainment pursuits. The high incidence of these sorts of activities also reflects the fact that they are readily available at most destinations.

Americans were more likely to have pursued 26 of 57 cultural activities including visiting zoos, aquariums, and theme parks, visiting historical sites, museums and aboriginal cultural attractions and events, attending professional sporting events, and visiting casinos and horse races. The types of cultural and entertainment activities pursued by Americans (relative to Canadians) suggest that Americans are more interested in history, and are often attracted to types of entertainment that provide excitement.

Cultural and entertainment activities that are more likely to be pursued in the next two years than they were in the past two years are often unique to a given area (e.g., seeing natural sites such as Niagara Falls, experiencing French Canadian culture, visiting amusement and movie theme parks), or distinctive events (e.g., attending a national or international sporting event, attending musical festivals, carnivals, literary festivals, film festivals). This suggests that there is strong, emerging desire for novelty in cultural entertainment attractions that will be pursued in the future.

Overview Report: Key Findings (Continued)

Accommodation-Related Activities

Of the 20 types of activity-related accommodation assessed, travelers were most likely to have stayed in public camp grounds, resorts (during the summer) or a bed and breakfast. Canadians were more likely than Americans to have camped or stayed in a privately-owned cottage or condo. By contrast, Americans were more like to have stayed in a bed and breakfast. There is also a tendency for Canadians to vacation near lakes, while Americans are more likely to stay near the ocean. This pattern reflects the relative distribution of the populations of the two countries, with Canadians more likely (than Americans) to live near a lake, and Americans more likely (than Canadians) to live near an ocean.

Day and Overnight Touring

The most common type of touring activity was that taken using a personal vehicle (e.g., wandering around small towns and villages, coastal or lakeshore drives). Affluent Young Couples and Affluent Mature and Senior Couples were the most likely to have taken a tour of this type, suggesting they are prime markets for touring travel using a personal vehicle. The most common public tours taken include guided bus and boat tours of cities and the countryside, tours of wineries, and ocean cruises. Mainstream Senior Couples and Senior Singles were especially likely to have taken a guided bus tour during the last two years, and these segments are clearly prime markets for this sort of touring activity. Wine tours were most often taken by Affluent Young Couples, Affluent Mature Singles, and Affluent Mature and Senior Couples.

Business Travel

The most common types of business travel in the past two years were trips to attend business meetings, and trips to attend conferences and seminars. Attending company-paid training, business conventions and trade shows were also common reasons for business travel. Four percent of North American travelers reported receiving a paid vacation from their employer (incentive travel) during the past two years. Americans were considerably more likely to have taken overnight business trips to other cities. This is especially evident in travel to attend a conference or seminar and going to another city to receive training. The incidence of business travel increased sharply with increases in education level and household income.

Overview Report: Key Findings (Continued)

Brief and Longer Vacations

Both Americans and Canadians were about 40 % more likely to take a brief (1 to 3 days) vacation than a longer (4 plus days) vacation during the winter, spring and fall seasons. This suggests that particular attention should be directed to brief vacations for off-season marketing, promotional and advertising activity. Americans were 22 % more likely to take a brief vacation and 35 % more likely to take a longer vacation in the spring than Canadians. In the fall, Americans were 12 % more likely to take a brief vacation and 26 % more likely to take a longer vacation than Canadians. The more affluent segments of the market were more likely to take brief vacations during the winter, spring and fall seasons than the mainstream segments. Marketing activities should target more affluent markets during the non-peak travel seasons.

Most trips were taken with a spouse or partner, the immediate family , or family members and friends. The composition of the travel party was strongly associated with the composition of the household. The most common accommodation respondents stayed in while on vacation were hotels, resorts, country inns and motels. Relative to Americans, Canadians were more likely to use motorhomes, truck campers, vans and tents while on vacation.

Past experience and the advice of friends and family were the most frequently used sources of information to plan vacations and especially brief vacations. The Internet was also frequently used in the planning process. Travel agents were used more often to plan longer vacations. Relative to Canadians, Americans were more likely to use the Internet, airline reservation systems, and direct mail when planning their vacations.

Use of Vacation Packages

27 % of those who took a brief vacation and 32 % of those who took a longer vacation during the past two years reported having purchased vacation packages at least sometimes. The mature and senior sectors of the market were the most likely to have purchased brief (1 to 3 day) vacation packages while longer vacation packages were typically purchased by Affluent Young Couples, Affluent Families, Affluent Mature and Senior Couples, and Senior Singles.

The most frequently purchased types of vacation packages were for resorts or cruises. Americans were 25 % more likely than Canadians to have purchased a resort or cruise vacation package during the past two years. Canadians were more likely than Americans to have purchased adventure packages, city packages, and educational packages.

Overview Report: Key Findings (Continued)

Impressions of Canada

As a vacation destination, Canada is better known as a place with natural richness that offers ample opportunities to experience nature and participate in outdoor activities, than as a place which offers culture and entertainment. Thus, Canada receives its highest image ratings as a place with beautiful scenery that is great for fishing and hunting, and a great place to get away from it all. It is also perceived as a place that respects the natural environment, is safe for tourists, and has friendly people.

Americans (relative to Canadians) were especially likely to view Canada as a nature-oriented travel destination. However Americans who had traveled to Canada in the last two years were more likely to perceive Canada as a destination which offered some opportunities to experience culture and entertainment. Among Americans, Canada's positive image was strongest among those who were older, with less education and lower household income. There is less variation in Canada's vacation destination imagery among Canadians. However, Canadian Affluent Young Couples were observed to have a relatively weak impression of Canada as a destination that offers opportunities to experience culture and entertainment.

Impressions of Ontario

Among Americans, Ontario's image was quite similar to that of Canada. As such, Americans viewed Ontario as a place with beautiful scenery, which is great for hunting and fishing, and is well cared for. They considered Ontario a good place to relax and get away from it all, a place for romantic vacations, and a place with very friendly people. On the other hand, Ontario was less well known for its cultural richness (museums, art galleries, theatre) and a place that offers opportunities to experience "the good life" (e.g., fine dining). Among Americans, Ontario's positive image is weakest among younger travelers, those with more education and higher household incomes.

Among Canadians from other provinces, Ontario was primarily seen as offering opportunities for culture and entertainment (rather than nature and outdoor activities). The extent to which Ontario was perceived as a cultural and entertainment centre was especially evident among those from the Atlantic provinces. (Note: Respondents from Quebec seem to have an image of Ontario that is comparable to that of the average American). This suggests that Ontario's larger urban centres tend to exert a greater influence on the image of the province held by Canadians from other provinces. This outcome is understandable insofar as many Canadians are likely to view Ontario as the most populous and urban region of Canada, while offering opportunities to experience nature that are similar to those of other regions of Canada.

Overview Report: Key Findings (Continued)

New Tourism Attractions

Respondents were asked whether each of 16 tourism attractions would make them more interested in taking a trip to Ontario. Overall, the most appealing tourism attractions were an overnight train tour through natural terrain, overnight cruises on the Great Lakes, and games parks or reserves with wildlife viewing areas.

Americans were more likely to be motivated to take a trip to Ontario for nature-oriented attractions such as an overnight train tour through natural terrain, a games park or games reserve, Great Lakes cruises, and a forestry or mining attraction. They were also more likely to be motivated to take a trip to Ontario to see a Canadian aboriginal attraction and a heritage attraction such as the Indian Museum. These attractions may be more distinctive from those available in the U.S., and consistent with their impressions of Ontario as a place that offers opportunities to experience nature and the outdoors.

Relative to Americans, Canadians were more likely to be motivated to travel to Ontario by the addition of new theme parks (e.g., science and technology, movie, children's). This may also reflect the fact that many Canadians from other provinces, and especially those from the Atlantic region, view Ontario as a cultural and entertainment centre rather than a place within Canada that is distinctly well-suited to experience nature and participate in outdoor activities. As well, the abundance of well-known theme parks in the United States may make this sort of attraction less distinctive for Americans.

Vue d'ensemble

- Conclusions principales -

Ensemble des habitudes de voyage

Les Américains visitent un plus grand nombre de destinations que les Canadiens. Ceci découle de l'incidence beaucoup plus élevée de voyages inter-États effectués par les Américains comparativement aux voyages inter-provinciaux effectués par les Canadiens. Les voyages faits par les Canadiens aux États-Unis équivalent à 253 % des voyages faits par les Américains au Canada (33 % par rapport à 13 %). Les Canadiens, lorsqu'ils voyagent, le font dans l'axe nord-sud, alors que les Américains préfèrent l'axe est-ouest. Le niveau d'instruction du répondant et le revenu du ménage jouent un rôle indiscutable dans la fréquence des voyages. Ceci est particulièrement vrai pour les voyages internationaux.

Alors que les voyages d'agrément sont plus fréquents pendant l'été tant au Canada qu'aux États-Unis, les Américains sont plus nombreux que les Canadiens à voyager au printemps et à l'automne. En saison intermédiaire, les personnes à revenu élevé, en particulier, les adultes d'âge mûr et les couples âgés, sont des marchés de premier ordre. Toutefois, pendant l'été, la différence entre les segments diminuent et, étant donné leur taille restreinte, des segments comme ceux des jeunes familles à revenu moyen, des familles d'âge mûr à revenu moyen et des couples d'âge mûr à revenu moyen prennent une importance stratégique accrue.

Voyages vers le Canada depuis les États-Unis

13,1 % des résidents des États-Unis (18 ans et plus) ont fait un voyage d'agrément d'au moins une nuit au Canada au cours des deux dernières années. Les provinces les plus fréquemment visitées ont été l'Ontario (7,2 % des Américains l'ayant visité au moins une fois), la Colombie-Britannique (4,0 %) et le Québec (3,3 %). Les marchés américains qui génèrent l'incidence de voyages la plus élevée vers le Canada sont principalement situés le long de la frontière canadienne et comprennent des centres urbains tels que Rochester, Seattle, Buffalo, Detroit, Cleveland et Toledo. Les centres urbains qui génèrent le plus grand nombre de voyages au Canada sont Detroit, Boston, Chicago, New York et Seattle. La proximité dicte les marchés de premier ordre pour chaque province.

Les voyages au Canada se concentrent principalement pendant les mois d'été, 7,8 % des Américains ayant fait au moins un voyage estival au Canada au cours des deux dernières années. Le nombre de voyages au Canada est légèrement plus élevé à l'automne (4,4 %) qu'au printemps (3,5 %) et qu'en hiver (3,0 %). Quant aux habitudes de voyage en général, les voyages au Canada augmentent en corrélation avec le niveau d'instruction du répondant et le revenu du ménage. Ceci est particulièrement vrai pour les voyages d'affaires.

Vue d'ensemble

- Conclusions principales (Suite) -

Voyages effectués au Canada par les Canadiens

En moyenne, au cours des deux dernières années, les Canadiens ont effectué 4,0 voyages d'agrément intraprovinciaux et 1,7 voyage d'agrément interprovincial. Le pourcentage de voyages intraprovinciaux (par rapport au pourcentage de voyages interprovinciaux) était le plus élevé dans les provinces les plus populeuses, soit l'Ontario, le Québec et la Colombie-Britannique. Dans les Maritimes, au Manitoba et en Saskatchewan, le nombre de voyages intraprovinciaux était comparable au nombre de voyages interprovinciaux. La majorité des voyages d'agrément interprovinciaux avaient pour destination l'Ontario, le Québec, l'Alberta et la Colombie-Britannique. Les voyages ont généralement été effectués dans la province voisine, bien qu'il y ait eu certaines exceptions (par exemple, les voyages de l'Alberta à Terre-Neuve ont été exceptionnellement nombreux).

Tout comme les voyages long-courriers au Canada depuis les États-Unis, les voyages d'agrément interprovinciaux ont été plus concentrés pendant l'été que les voyages intraprovinciaux, ce qui indique que le marché intraprovincial a une grande importance stratégique pendant l'hiver, le printemps et l'automne, alors que les voyages interprovinciaux sont stratégiquement importants en été.

Intentions de voyager au Canada au cours des deux prochaines années

Quelque 65,4 % des résidents du Canada et 29,2 % des résidents des États-Unis prévoient faire un voyage d'agrément au Canada au cours des deux prochaines années. Le pourcentage de résidents du Canada qui prévoient voyager (65,4 %) est comparable au nombre de personnes qui ont pris des vacances au pays au cours des deux dernières (59,8 %). Cependant, les résidents des États-Unis qui ont exprimé leur intention de voyager au Canada (29,2 %) ont été 222 % plus nombreux que ceux qui s'y sont rendus au cours des deux dernières années (13,1 %).

Vue d'ensemble

- Conclusions principales (Suite) -

Ceux qui ne voyagent pas

Quelque 15,7 % des Nord-Américains n'ont pas effectué de voyage de plus de 24 heures (quelque soit le motif) au cours des deux dernières années et ne prévoient pas faire un voyage d'agrément au cours des deux prochaines années. Quelque 8,0 % ont effectué un voyage de plus de 24 heures au cours des deux dernières années mais n'ont pas l'intention d'en faire au cours des deux prochaines. Quelque 7,0 % n'ont pas effectué de voyage de plus de 24 heures au cours des deux dernières années mais prévoient en faire un au cours des deux prochaines. La fréquence des « non-voyageurs » a augmenté proportionnellement avec l'âge du répondant et était la plus élevée chez les ménages dont le revenu était inférieur à 40 000 $. La principale raison pour ne pas voyager, c'est que les voyages « coûtent trop cher » (41 %). D'autres raisons ont été évoquées, dont notamment « pas assez de congé au travail », « trop vieux pour voyager », « maladie ou infirmité » et « j'ai tout ce qu'il me faut là où j'habite ».

Activités quotidiennes en dehors de la période de vacances

Les activités de plein air quotidiennes les plus fréquemment poursuivies en vacances étaient la pêche, la chasse, le canoë et le kayak. Les activités physiques et sportives quotidiennes les plus fréquemment poursuivies en vacances étaient le golf, le ski alpin, la motoneige et le ski de randonnée. Toutes ces activités exigent certaines compétences et du matériel spécialisé.

La corrélation était comparativement faible entre les activités de loisirs réalisées en vacances et celles réalisées en dehors des vacances, ce qui indique que les diverses formes de loisirs recherchées en vacances sont différentes de celles recherchées au quotidien. La corrélation était également relativement faible entre les activités culturelles privilégiées en vacances et celles recherchées en dehors des vacances, exception faite de certaines activités particulières, par exemple le ballet, l'opéra et le théâtre.

Vue d'ensemble

- Conclusions principales (Suite) -

La lecture des médias et les voyages

La lecture de la section voyage dans les quotidiens avait une forte corrélation avec le nombre de voyages d'agrément effectués au cours des deux dernières années. En outre, les personnes qui voyagent fréquemment étaient davantage susceptibles de lire des revues d'actualité (Macleans, Time), des revues de voyage, National Geographic et des revues d'intérêt général. Le rapport entre la fréquence des voyages d'agrément et les préférences télévisuelles était plus faible que celui observé dans le cas des médias imprimés. Cependant, les personnes qui voyagent fréquemment étaient davantage susceptibles de regarder les émissions de sport professionnel et les nouvelles mais non la télévision le jour.

Utilisation d'Internet

Quelque 47,0 % de la population des États-Unis et 37,6 % de la population canadienne (18 ans et plus) déclarent utiliser Internet de façon régulière pour obtenir de l'information sur toutes sortes de sujets. L'utilisation d'Internet comme source d'information avait une forte corrélation avec la fréquence des voyages d'agrément au cours des deux dernières années. Ainsi, 63 % des personnes qui ont effectué 10 voyages d'agrément ou plus au cours des deux dernières années utilisent Internet, alors que seulement 28 % de celles qui n'ont pas effectué de voyage d'agrément utilisent Internet régulièrement. L'utilisation d'Internet comme source d'information a augmenté de façon marquée en fonction du niveau d'instruction du répondant et du revenu familial. Quelque 13,3 % de la population nord-américaine (18 ans et plus) avaient fait des réservations de voyage par Internet. Les Américains étaient presque trois fois plus susceptibles de faire des réservations par Internet (14,2 %) que les Canadiens (5,2 %).

Adhésion à une association et voyages d'agrément

Il y avait une étroite corrélation entre la fréquence des voyages d'agrément et l'adhésion à une association. Cette corrélation était particulièrement étroite entre les voyages d'agrément et les abonnements aux galeries d'art, aux musées et aux organismes de pleine nature. La corrélation était également relativement étroite entre la fréquence des voyages d'agrément et les abonnements aux associations d'automobilistes et aux clubs sportifs au cours des deux dernières années. Cette corrélation entre l'adhésion à une association et les voyages d'agrément indique que les revues et les bulletins diffusés par une telle association constituent un média efficace de promotion de diverses destinations touristiques.

Vue d'ensemble

- Conclusions principales (Suite) -

Fréquentation des foires commerciales liées aux voyages

Environ le tiers des adultes américains et canadiens de 18 ans ou plus ont fréquenté au moins une foire commerciale liée aux voyages au cours des deux dernières années. Il y avait une étroite corrélation entre cette fréquentation et le nombre de voyages d'agrément effectués au cours des deux dernières années. Cette corrélation était plus étroite avec les voyages effectués au pays qu'avec ceux effectués à l'étranger, ce qui indique que les foires commerciales liées aux voyages, notamment lorsqu'il s'agit de vacances et d'activités en plein air (véhicules de plaisance, salons nautiques, salons sportifs), attirent davantage les personnes qui préfèrent les voyages de courte distance.

Activités de vacances recherchées

Les activités le plus souvent recherchées en vacances étaient le repos et les relations sociales avec le conjoint ou la conjointe, les membres de la familles, les amis et les parents. Ce phénomène indique que les voyages d'agrément offrent l'occasion de récupérer du stress et des exigences de la vie quotidienne, de renouer les liens sociaux et d'apprécier la compagnie des proches. Les vacances sont aussi fréquemment l'occasion de voir et d'apprécier les merveilles de la nature, les sites historiques, les autres cultures et la nature à l'état sauvage. Les vacances sont donc une occasion de vivre dans un milieu différent de celui de la vie quotidienne. La recherche d'activités exploratoires en vacances semble avoir une corrélation avec le niveau d'éducation et le revenu familial du répondant. Les vacances sont moins fréquemment prises pour se gâter soi-même. Ainsi, les répondants étaient moins susceptibles d'effectuer un voyage d'agrément pour « faire la belle vie » (par exemple, fine cuisine, gâterie), visiter les casinos, faire l'expérience de la vie en ville (magasinage, vie nocturne) ou visiter un endroit populaire ou à la mode. Cependant, il est clair que ce genre d'activité attire les jeunes voyageurs. Les vacances qui offrent l'occasion d'apprendre ou d'améliorer ses connaissances par le biais d'expériences éducatives ou pratiques étaient également davantage susceptibles d'être recherchées par les jeunes voyageurs célibataires.

Vue d'ensemble

- Conclusions principales (Suite) -

Activités de vacances en plein air

Les activités de plein air le plus souvent réalisées en voyage étaient celles qui sont les moins exigeantes et les moins dispendieuses, par exemple les pique-niques dans les parcs, les bains de soleil, la plage, la nage et l'exploration de la faune et de la flore. Ces activités de plein air peuvent être réalisées par des personnes de tous âges, peu importe leur condition physique et leurs moyens financiers. La pêche et le golf étaient les sports les plus fréquemment pratiqués, 26 % des voyageurs s'étant adonnés à la pêche en eau douce et 20 % ayant joué une partie de golf occasionnelle lors de leur voyage. Les randonnées et les excursions pédestres, le conditionnement physique et le jogging, la bicyclette, le canoë et le kayak font également partie des activités de plein air le plus souvent recherchées en voyage.

Les activités de plein air plus exigeantes (base-ball, escalade, deltaplane, planche à neige) étaient généralement pratiquées par des jeunes vacanciers (34 ans et moins), les taux de participation déclinant nettement en fonction de l'âge. Cependant, les activités exigeantes ne sont pas réservées qu'à ce groupe d'âge. Par exemple, le ski alpin, la voile et la motocyclette étaient souvent pratiqués par des voyageurs plus âgés.

Activités culturelles et de divertissement en vacances

Les voyageurs étaient davantage susceptibles d'avoir participé à des activités culturelles et de divertissement qu'à des activités de plein air au cours des deux dernières années. Les dîners, le magasinage et la lecture étaient les formes de divertissement les plus fréquemment recherchées en voyage. Le cinéma, la visite de musées, de galeries d'art et de jardins zoologiques, les foires et les festivals locaux et les attractions naturelles faisaient également parties des activités culturelles et de divertissement fréquemment recherchées. La fréquence élevée de ces activités indique, du moins en partie, qu'elles sont facilement accessibles dans la plupart des destinations.

Vue d'ensemble

- Conclusions principales (Suite) -

Activités culturelles et de divertissement en vacances (Suite)

Les Américains étaient davantage susceptibles d'avoir recherché 26 des 57 activités culturelles (visiter des jardins zoologiques, des aquariums, des parcs d'attractions, des sites historiques, des musées, des attractions culturelles autochtones et des casinos, et assister à des événements de sport professionnel et à des courses de chevaux). Les types d'activités culturelles et de divertissement recherchées par les Américains (par rapport aux Canadiens) indiquent que les Américains sont davantage intéressés par l'histoire et sont souvent attirés par les types de loisirs qui offrent des sensations.

Les activités culturelles et de divertissement qui sont plus susceptibles d'être recherchées au cours des deux prochaines années qu'au cours des deux dernières sont souvent propres à une région particulière (visiter des sites naturels, comme les chutes du Niagara, vivre en milieu canadien-français, visiter des parcs d'amusement et d'attractions), ou à une événement en particulier (assister à des événements sportifs nationaux ou internationaux, à des festivals de musique, à des carnavals, à des festivals littéraires ou à des festival de films). Ces phénomènes indiquent clairement un besoin émergeant de nouveauté dans les attractions culturelles et de divertissement futures.

Activités liées à l'hébergement

Des vingt types d'activités liées à l'hébergement qui ont été étudiées, les voyageurs étaient davantage susceptibles d'avoir séjourné dans des terrains de camping, des centres de villégiature (en été) ou dans des gîtes touristiques. Les Canadiens étaient plus susceptibles que les Américains d'avoir séjourné dans un terrain de camping ou dans un chalet ou un condo privé. Par contre, les Américains étaient davantage susceptibles d'avoir séjourné dans un gîte touristique. Les Canadiens ont également tendance à séjourner près des lacs, alors que les Américains sont davantage susceptibles de séjourner près de la mer. Ce phénomène reflète la répartition relative de la population des deux pays, les Canadiens étant davantage susceptibles d'habiter près d'un lac et les Américains près de la mer.

Vue d'ensemble

- Conclusions principales (Suite) -

Excursions d'un jour ou deux

Le type d'excursion le plus fréquent a été effectué en voiture (visite de villes et villages, promenade au bord de la mer ou d'un lac). Les jeunes couples aisés et les couples âgés et d'âge mûr aisés étaient les plus susceptibles d'avoir fait une excursion de ce type, ce qui laisse entendre qu'ils constituent un marché cible pour les excursions touristiques en voiture. Les types les plus courants d'excursions publiques comprennent les excursions guidées en autocar ou en bateau, les visites d'établissements vinicoles et les croisières en mer. Les couples âgés et les célibataires âgés étaient particulièrement susceptibles d'avoir effectué une visite guidée par autocar au cours des deux dernières années, et ces segments sont clairement ciblés pour ce genre d'excursion. Les visites d'établissements vinicoles étaient le plus souvent effectuées par des jeunes couples aisés, des célibataires aisés d'âge mûr et des couples âgés et d'âge mûr aisés.

Voyages d'affaires

Les types de voyages d'affaires les plus courants effectués au cours des deux dernières années étaient des voyages en vue d'assister à des réunions d'affaires et des voyages en vue d'assister à des conférences et des séminaires. Les voyages d'affaires avaient également pour objectifs d'assister à de la formation payée par l'entreprise, à des congrès d'affaires et à des foires commerciales. Quelque 4 % des voyageurs nord-américains ont déclaré avoir bénéficié de vacances payées par leur employeur (voyages-récompenses) au cours des deux dernières années. Les Américains étaient beaucoup plus susceptibles d'avoir effectué un voyage d'affaires de plus de 24 heures dans une autre ville. Ce phénomène est particulièrement évident dans le cas des voyages en vue d'assister à une conférence ou à un séminaire et pour recevoir de la formation. La fréquence des voyages d'affaires augmentait de façon marquée en fonction du niveau d'instruction et du revenu familial.

Vue d'ensemble

- Conclusions principales (Suite) -

Vacances de courte et de longue durée

Environ 40 % des Américains et des Canadiens étaient davantage susceptibles de prendre des vacances de courte durée (de 1 à 3 jours) que des vacances de longue durée (4 jours et plus) au cours de l'hiver, du printemps et de l'automne. Ce phénomène suggère qu'une attention particulière devrait être portée aux vacances de courte durée en ce qui touche la commercialisation, la promotion et la publicité hors saison. Les Américains étaient 22 % plus susceptibles que les Canadiens de prendre des vacances de courte durée et 35 % plus susceptibles que les Canadiens de prendre des vacances de longue durée au printemps. En automne, les Américains étaient 12 % plus susceptibles de prendre de courtes vacances et 26 % plus susceptibles de prendre de longues vacances que les Canadiens. Les segments les plus aisés du marché étaient plus susceptibles de prendre de courtes vacances en hiver, au printemps et à l'automne que les segments moyens. Les activités de commercialisation devraient donc cibler les marchés aisés pendant les saisons mortes.

La plupart des voyages ont été effectués avec le conjoint ou la conjointe, la famille immédiate ou des parents et amis. La composition du groupe de voyageurs était étroitement associée à la composition du ménage. Les types d'hébergement le plus souvent utilisés en vacances étaient les hôtels, les centres de villégiature, les auberges et les motels. Par rapport aux Américains, les Canadiens étaient davantage susceptibles d'utiliser en vacances des autocaravanes, des autocaravanes séparables, des fourgonnettes et des tentes. Les expériences passées et les conseils d'amis et de la famille étaient les sources d'information les plus fréquemment utilisées pour planifier les vacances, en particulier celles de courte durée. Internet était également utilisé fréquemment dans la planification. Les agences de voyages étaient utilisées le plus souvent pour planifier des vacances de longue durée. Par rapport aux Canadiens, les Américains étaient davantage susceptibles d'utiliser Internet, les systèmes de réservation des lignes aériennes et le publipostage lors de la planification de leurs vacances.

Vue d'ensemble

- Conclusions principales (Suite) -

Utilisation des forfaits de vacances

Quelque 27 % des personnes qui ont pris des vacances de courte durée et 32 % de celles qui ont pris des vacances de longue durée au cours des deux dernières années ont déclaré avoir acheté des forfaits de vacances au moins quelques fois. Les vacanciers âgés et d'âge mûr étaient les plus susceptibles d'avoir acheté des forfaits de vacances de courte durée (de 1 à 3 jours) alors que les forfaits de vacances de longue durée étaient généralement achetés par les jeunes couples aisés, les familles aisées, les couples âgés et d'âge mûr aisés et les célibataires âgés.

Les forfaits de vacances le plus souvent achetés étaient les séjours dans des centres de villégiature et les croisières. Les Américains étaient 25 % plus susceptibles que les Canadiens d'avoir acheté un forfait dans un centre de villégiature ou une croisière au cours des deux dernières années. Les Canadiens étaient plus susceptibles que les Américains d'avoir acheté des forfaits aventure, des forfaits en ville et des forfaits éducatifs.

Impressions du Canada

À titre de destination de vacances, le Canada est davantage perçu comme une terre de richesses naturelles qui offre de nombreuses occasions de découvrir la nature et de participer à des activités de plein air que comme une terre de culture et de divertissement. Ainsi, le Canada est coté comme un endroit aux beaux paysages qui est formidable pour la pêche et la chasse et un excellent endroit pour s'évader. Il est également perçu comme un endroit qui respecte l'environnement naturel, qui est sécuritaire pour les touristes et où les gens sont amicaux.

Par rapport au Canadiens, les Américains étaient particulièrement susceptibles de voir le Canada comme une destination de voyage axé sur la nature. Cependant, les Américains qui avaient voyagés au Canada au cours des deux dernières années étaient plus susceptibles de percevoir le Canada comme une destination qui offre certaines occasions de réaliser des activités culturelles et de divertissement. Chez les Américains, l'image du Canada était la plus forte chez les personnes âgés, moins éduquées et ayant un revenu familial peu élevé. L'image du Canada en tant que destination de vacances varie moins chez les Canadiens. Cependant, on constate que les jeunes couples aisés ont une impression relativement faible du Canada en tant que destination qui offre des occasions de réaliser des activités culturelles et de divertissement.

Vue d'ensemble

- Conclusions principales (Suite) -

Impressions de l'Ontario

L'image que se font les Américains de l'Ontario est semblable à celle qu'ils se font du Canada. Ainsi, les Américains voient l'Ontario comme un endroit aux beaux paysages qui est très bien pour la pêche et la chasse et qui est bien entretenu. Ils considèrent l'Ontario comme un bon endroit pour relaxer et s'évader, un endroit où passer des vacances romantiques et un endroit où les gens sont très amicaux. Par contre, l'Ontario était moins connue pour ses richesses culturelles (musées, galeries d'art, théâtres) et pour ses occasions de faire « la belle vie » (dîners raffinés). Chez les Américains, l'image de l'Ontario est la plus faible parmi les jeunes voyageurs, ceux étant les plus instruits et ayant un revenu familial élevé.

Chez les Canadiens des autres provinces, l'Ontario était surtout perçue comme un endroit où réaliser des activités culturelles et de divertissement (plutôt que des activités en pleine nature). La perception de l'Ontario en tant que centre culturel et de divertissement était surtout évidente chez les voyageurs des provinces atlantiques. (Remarque : L'image que se font les Québécois de l'Ontario est comparable à celle que s'en font les Américains.) Ce phénomène indique que les grands centres urbains de l'Ontario semblent avoir une grande influence sur l'image que s'en font les Canadiens des autres provinces. Cette constatation peut se comprendre dans la mesure où de nombreux Canadiens sont susceptibles de voir l'Ontario comme la région la plus populeuse et la plus urbanisée du Canada mais offrant des occasions de découvrir la nature semblables à celles des autres régions du Canada.

Nouvelles attractions touristiques

Ontario. Dans l'ensemble, les attractions touristiques les plus attrayantes étaient les voyages en train de deux jours dans des endroits naturels, les croisières de deux jours sur les Grands Lacs et les réserves fauniques avec aires d'observation.

Les Américains étaient les plus susceptibles d'être motivés pour faire un voyage en Ontario pour y réaliser des activités en pleine nature, par exemple un voyage en train de deux jours en milieu naturel, la visite de réserves fauniques, les croisières sur les Grands Lacs et les milieux forestiers ou miniers. Ils étaient également les plus susceptibles de faire un voyage en Ontario pour y assister à des événements autochtones canadiens et visiter, par exemple, un musée autochtone. Ces attractions sont peut-être plus distinctives que celles offertes aux États-Unis et correspondent à l'impression qu'ils ont que l'Ontario est un endroit qui offre des occasions de réaliser des activités en pleine nature et en plein air.

Vue d'ensemble

- Conclusions principales (Suite) -

New Tourism Attractions

Par rapport aux Américains, les Canadiens étaient plus susceptibles de voyager en Ontario en raison de l'ajout de nouveaux parcs d'attractions (par exemple, cinéma, parcs technologiques et parcs pour enfants). Ce phénomène reflète en outre le fait que de nombreux Canadiens des autres provinces, et notamment ceux de la région atlantique, voient l'Ontario comme un centre culturel et de divertissement plutôt que comme un endroit au Canada qui conviendrait très bien aux activités en pleine nature et en plein air. En outre, l'abondance de parcs d'attractions bien connus aux États-Unis rend peut-être ce genre d'attraction moins distinctif aux yeux des Américains.

Travel Activities & Motivation Survey

TAMS Technical Appendices

(For Use With the TAMS Reports)

TAMS
Travel Activities &
Motivation Survey

March, 2001

Lang

Appendix One

Statistical Precision and Confidence Intervals

Since the Travel Activities & Motivation Survey (TAMS) is based on a random probability sample (rather than a complete census), the statistics reported in this study are estimates. The accuracy of these estimates will vary from analysis to analysis depending on the sample size, the type of measurement reported and measurement variations. The statistical precision associated with any given estimate is reflected by its confidence interval.

A confidence interval is an estimate of the range of values which would be expected by chance alone for a selected probability level. For example, the "95 % confidence interval" is the range of values which would be expected to occur randomly 19 times out of 20 (or 95 % of the time). Thus, if a survey found that 50 % of the individuals in a sample of 500 were interested in a given activity, the 95 % confidence interval for this estimate would be ±3.5 % (or between 53.5 % to 46.5 %). This means that if this survey were conducted 20 times with the same size sample, the estimated level of respondents interested in a given activity would fall between 53.5 % and 46.5 % nineteen times out of 20.

The estimated confidence interval is affected by several factors including the sample size, the type of measure taken (i.e., whether the measurement may assume two values such as "yes" or "no", or many values such as "household income") and the level of variation which exists within the data. As a guideline to interpreting the results of this study, estimates of the 95 % confidence intervals are provided for various sample sizes in the table below:

Number of Cases in Sample

Percent	46000	12000	5000	1000	500	100
50.00%	0.05%	0.20%	0.49%	2.45%	4.90%	24.50%
40.00%	0.05%	0.20%	0.47%	2.35%	4.70%	23.52%
30.00%	0.04%	0.17%	0.41%	2.06%	4.12%	20.58%
20.00%	0.03%	0.13%	0.31%	1.57%	3.14%	15.68%
10.00%	0.02%	0.07%	0.18%	0.88%	1.76%	8.82%
5.00%	0.01%	0.04%	0.09%	0.47%	0.93%	4.66%
2.00%	0.00%	0.02%	0.04%	0.19%	0.38%	1.92%

Telephone Sample Description: Weighted

Attribute	*Level*	*Total*	*Canada*	*U.S.A.*
Number of Interviews		46,782	28,397	18,385
Gender	Male	45.0 %	45.1 %	45.0 %
	Female	55.0 %	54.9 %	55.0 %
Age	18 to 25	13.6 %	13.3 %	13.9 %
	26 to 34	20.6 %	20.8 %	20.5 %
	36 to 44	23.3 %	24.1 %	22.8 %
	46 to 54	17.5 %	16.7 %	18.1 %
	56 to 65	11.2 %	11.4 %	11.0 %
	66 Plus	13.7 %	13.7 %	13.7 %
Education Level	High/Trade School	42.5 %	48.6 %	38.6 %
	College or University	49.3 %	46.7 %	51.0 %
	Advanced University Degree	8.1 %	4.7 %	10.4 %
Household Income	Under $20,000	14.8 %	17.8 %	12.8 %
	$20,000 to $40,000	22.9 %	24.6 %	21.8 %
	$40,000 to $60,000	18.9 %	19.0 %	18.9 %
	$60,000 to $80,000	11.8 %	11.7 %	11.8 %
	$80,000 to $100,000	6.4 %	6.3 %	6.4 %
	$100,000 Plus	8.8 %	7.4 %	9.7 %
	Refused/Don't Know	16.5 %	13.2 %	18.6 %

Appendix Two

Mailback Sample Description: Weighted

Attribute	*Level*	*Total*	*Canada*	*U.S.A.*
Number of Interviews		11,892	5,490	6,402
Gender	Male	43.7 %	44.0 %	43.6 %
	Female	56.3 %	56.0 %	56.4 %
Age	18 to 25	8.3 %	9.7 %	7.1 %
	26 to 34	17.9 %	19.1 %	16.8 %
	36 to 44	24.8 %	25.3 %	24.3 %
	46 to 54	21.7 %	20.0 %	23.1 %
	56 to 65	14.4 %	14.0 %	14.7 %
	66 Plus	13.0 %	11.9 %	14.0 %
Education Level	High/Trade School	31.8 %	38.0 %	26.5 %
	College or University	56.5 %	55.1 %	57.6 %
	Advanced University Degree	11.7 %	6.9 %	15.8 %
Household Income	Under $20,000	8.9 %	10.4 %	7.5 %
	$20,000 to $40,000	21.8 %	23.1 %	20.7 %
	$40,000 to $60,000	22.3 %	22.6 %	22.1 %
	$60,000 to $80,000	15.6 %	15.5 %	15.7 %
	$80,000 to $100,000	8.5 %	8.8 %	8.2 %
	$100,000 Plus	11.6 %	10.8 %	12.3 %
	Refused/Don't Know	11.3 %	8.8 %	13.5 %

Appendix Three

Household Life Cycle Stage

The Household Life Cycle Stage variable has been constructed taking the following variables into consideration: The age of the respondent, the age of all children under 21 living in the household, and the marital status of the respondent. There are eight life cycle stages identified in this variable:

- Young Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Families: At least one child (of respondent) under 13 living in the home; No restrictions for age or marital status
- Mature Families: At least one child (of respondent) under 21 living in the home; No children under 13 living in the home; No restrictions for age or marital status
- Mature Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Mature Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Senior Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older
- Senior Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older

Appendix Four:
Lifespan Demographic Segments
- Method Used to Construct Segmentation -

Throughout this report, the TAMS data will be examined using a market segmentation known as the Lifespan Demographic Segments. This scheme identifies various demographic sectors in the market with common vacation patterns and interests.

The Lifespan Demographic Segmentation scheme is an anchored segmentation where the data has been aggregated by life cycle stage, education level and household income. Households may be assigned to any given segment with information about the household life cycle stage, the respondent's education and household income. As such, this scheme is a powerful tool to identify strategic segments.

The Lifespan Demographic Segmentation was developed using the Ontario Tourism Marketing Partnership tracking program, based on 7,241 interviews conducted between July 12, 1999 and April 26, 2000. The segmentation scheme uses information about the types of trips taken by each household, the respondent's tendency to research vacations, and the household's vacation preferences and interests. Thirty-one core segmentor variables were used in this analysis, including: The incidence of 19 types of vacation travel (e.g., family urban explorations, couples retreats, family visits, adventure travel); the extent to which vacations are carefully planned; the amount of information consulted to plan vacations; interest in opportunities to learn while on vacation; interest in novel and exotic destinations; interest in vacations suitable for families; the appeal of vacation packages; the appeal of outdoor vacations; the appeal of cultural exploration; the appeal of pampering and entertainment; the appeal of excitement and nightlife; and the appeal of relaxing in a quiet setting while on vacation.

Appendix Four: Lifespan Segmentation Descriptions

Youth Segments

The three youth segments represent 20.3 % of the total market. Two of these are classified as Affluent Segments because of their household incomes and/or level of education. These households are all under 35, do not have children and are single or married couples.

Affluent Young Singles

- 5.9 % of market; 6.5 % of Canadian market; 5.8 % of U.S. market
- Life Cycle Stages: 100 % young singles; 64.0 % of respondents male
- Average Age: 25.3 years; Age Range: 54.5 % 18 to 25; 45.5 % 26 to 35
- Education: 67.7 % university or college educated; 9.7 % with advanced degrees (e.g., master's)
- Average Household Income: $72,000; Income Categories: 68.7 % $40K to $80K; 31.3 % $80K plus

Affluent Young Couples

- 2.7 % of market; 3.9 % of Canadian market; 2.6 % of U.S. market
- Life Cycle Stages: 100 % young couples; 42.8 % of respondents male
- Average Age: 28.9 years; Age Range: 18.8 % 18 to 25; 81.2 % 26 to 35
- Education: 100 % university or college educated; 17.8 % with advanced degrees (e.g., master's)
- Average Household Income: $74,400; Income Categories: 66.2 % $40K to $80K; 33.8 % $80K plus

Mainstream Youth Market

- 11.8 % of market; 13.2 % of Canadian market; 11.6 % of U.S. market
- Life Cycle Stages: 73 % young singles; 27 % young couples; 56.9 % of respondents male
- Average Age: 25.0 years; Age Range: 57.4 % 18 to 25; 42.6 % 26 to 35
- Education Level: 53 % university or college educated; 4.5 % with advanced degrees (e.g., master's)
- Average Household Income: $24,600; Categories: 93.3 % less than $40K; 6.8 % $40K to $80K

Appendix Four: Lifespan Segmentation Descriptions

Family Segments

The three family segments represent 36.2 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. All of these households have children under 21 and are primarily married. The Mainstream Young Families have at least one child 12 or younger while the Mainstream Mature Families have children between the ages of 13 and 21 (but no children 12 and under).

Affluent Families

- 6.6 % of market; 5.8 % of Canadian market; 6.7 % of U.S. market
- Life Cycle Stages: 69.9 % young families; 26.4 % mature families; 50 % of respondents male
- Average Age: 41.2 years; Age Range: 23.9 % under 35; 46.8 % 36 to 45; 29.3 % 46 and older
- Education: 100.0 % university or college educated; 29.1 % with advanced degrees (e.g., master's)
- Average Household Income: $107,400; Income Categories: 2.3 % $40K to $80K; 97.7 % $80K plus

Mainstream Young Families

- 23.0 % of market; 20.1 % of Canadian market; 23.4 % of U.S. market
- Life Cycle Stages: 100 % families with children 12 or younger; 42.9 % of respondents male
- Average Age: 35.3 years; Age Range: 52.8 % under 35; 37.1 % 36 to 45; 10.1 % 46 and older
- Education: 50 % university or college educated; 5.5 % with advanced degrees (e.g., master's)
- Average Household Income: $42,800; Income Categories: 49.0 % less than $40K; 51.0 % $40K plus

Mainstream Mature Families

- 6.6 % of market; 8.1 % of Canadian market; 6.4 % of U.S. market
- Life Cycle Stages: 100 % families with children between 13 and 21; 45.1 % of respondents male
- Average Age: 45.3 years; Age Range: 7.8 % under 35; 47.6 % 36 to 45; 44.6 % 46 and older
- Education Level: 47 % university or college educated; 5.5 % with advanced degrees (e.g., master's)
- Average Household Income: $48,200; Income Categories: 37.9 % less than $40K; 62.1 % $40K plus

Appendix Four: Lifespan Segmentation Descriptions

Mature Segments

The three mature segments represent 30.4 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. These households are all between 36 and 64 and do not have children. (Note: 3.8 % of the mature market has been classified with seniors in the Affluent Mature & Senior Couples).

Affluent Mature Singles

- 5.1 % of market; 2.4 % of Canadian market; 5.4 % of U.S. market
- Life Cycle Stages: 100 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 48.5 years; Age Range: 40.2 % 36 to 45; 37.6 % 46 to 55; 22.2 % 56 to 65
- Education: 100 % university or college educated; 26.5 % with advanced degrees (e.g., master's)
- Average Household Income: $71,000; Income Categories: 72.8 % $40K to $80K; 27.2 % $80K plus

Mainstream Mature Couples

- 12.8 % of market; 18.0 % of Canadian market; 12.3 % of U.S. market
- Life Cycle Stages: 100 % mature couples (36 to 65); 52.1 % of respondents male
- Average Age: 52.1 years; Age Range: 23.4 % 36 to 45; 38.4 % 46 to 55; 38.2 % 56 to 65
- Education: 48 % university or college educated; 6.0 % with advanced degrees (e.g., master's)
- Average Household Income: $49,600; Income Categories: 34.1 % less than $40K; 59.8 % $40K plus

Mainstream Mature Singles

- 8.6 % of market; 6.8 % of Canadian market; 8.9 % of U.S. market
- Life Cycle Stages: 73 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 50.2 years; Age Range: 35.0 % 36 to 45; 34.0 % 46 to 55; 31.1 % 56 to 65
- Education Level: 42 % university or college educated; 3.9 % with advanced degrees (e.g., master's)
- Average Household Income: $28,800; Income Categories: 84.0 % less than $40K; 16.0 % $40K plus

Appendix Four: Lifespan Segmentation Descriptions

Mature/Senior Segments

The three mature/senior segments represent 16.8 % of the total market. One of these segments is classified as an affluent segment because of its household incomes and/or level of education. The Affluent Mature and Senior Couples are primarily (85 %) from the mature market while the Mainstream Senior Couples and Senior Singles are all over 66 years old.

Affluent Mature and Senior Couples

- 4.5 % of market; 3.5 % of Canadian market; 4.7 % of U.S. market
- Life Cycle Stages: 85 % mature couples (35 to 65); 15 % senior couples (66 plus); 54.6 % male
- Average Age: 54.5 years; Age Range: 21.0 % 36 to 45; 37.3 % 46 to 55; 41.7 % 56 plus
- Education: 100 % university or college educated; 30.8 % with advanced degrees (e.g., master's)
- Average Household Income: $108,600; Income Categories: 100 % $80K plus

Mainstream Senior Couples

- 5.0 % of market; 6.5 % of Canadian market; 4.8 % of U.S. market
- Life Cycle Stages: 100 % senior couples (66 plus); 56.1 % of respondents male
- Average Age: 72.7 years; Age Range: 100 % 66 plus
- Education: 42.4 % university or college educated; 5.8 % with advanced degrees (e.g., master's)
- Average Household Income:$37,900; Income Categories: 57.4 % Less than $40K; 42.6 % $40K plus

(Affluent and Mainstream) Senior Singles

- 7.3 % of market; 5.1 % of Canadian market; 7.5 % of U.S. market
- Life Cycle Stages: 100 % senior singles; 35.6 % of respondents male
- Average Age: 74.9 years ; Age Range: 100 % 66 plus
- Education Level: 43 % university or college educated; 8.0 % with advanced degrees (e.g., master's)
- Average Household Income:$28,600; Income Categories: 78.7 % Less than $40K; 21.3 % $40K plus

Appendix Three
Factor Analysis of Vacation Experiences Sought During Past Two Years

The vacation experiences sought in the last two years were submitted to a factor analysis to identify underlying vacation experiences sought in pleasure travel. Factor analysis is a statistical technique which identifies and uses the association between individual responses to generate more general (or abstract) measures of the vacation experiences sought.The factors may be used to generate factor scores which reflect the general vacation experiences sought. This analysis identified the following five vacation experience factors:

Exploration: To visit historical sites and important places in history; To see natural wonders and important natural sites; To experience different cultures and ways of life; To experience unspoiled nature

Personal Indulgence: To visit a popular, trendy place; To visit casinos and gamble; To experience "the good life" - fine cuisine, being pampered; To experience city life (e.g., nightlife, shopping, museums)

Romance & Relaxation: To rest, relax and recuperate; For intimacy and romance; To spend quality time with the family away from home

Sports, Hobbies & Learning: To participate in a hobby or sport (e.g., golf, fishing, photography); To participate in a hands-on learning experience (e.g., archaeological digs, cooking courses)

Socializing: To visit friends or relatives who live in another city or country; To spend time with a group of good friends; To be someplace that feels familiar and safe

Appendix Four
Factor Analysis of Outdoor Activities While Travelling

The outdoor vacation activities sought in the last two years were submitted to a factor analysis to identify general outdoor activities sought in travel. Factor analysis is a statistical technique which uses the association between individual responses to construct more general (or abstract) categories of outdoor activities sought by individuals while travelling. The factors may be used to generate factor scores which measure the degree to which these general categories of outdoor activities have been pursued by various types of travellers. This analysis identified the following 17 types of outdoor activities:

Competitive Sports: Playing basketball; Baseball; Football; Volleyball; Bowling; Soccer; Chess or backgammon; Tennis

Nature Sports: Whitewater rafting; Kayaking & canoeing; Hiking or backpacking; Horseback riding

Water Sports: Sailing; Windsurfing; Scuba diving

Extreme Sports: Hang-gliding; Hot-air ballooning; Parachuting; Bungee jumping

Golfing: Golfing at a resort; Taking a golf package tour; Playing occasional golf game

Biking: Recreational biking; Mountain biking; Biking on overnight tour trip

Motorcycling: Motorcycling on overnight touring trip; Motorcycling - Day excursion

Fishing: Salt water fishing; Fresh water fishing; Motorboating

Hunting: Hunting big game; Hunting small game

Fitness: Jogging outdoors; Working out in fitness centre

Skiing & Snowboarding: Cross-country skiing (day activity; overnight tour group); Downhill skiing; Snowboarding

Snowmobiling: Snowmobiling as an overnight tour trip; Snowmobiling on organized trails

Skating & Hockey: Ice skating; Playing ice hockey; In-line/Roller-skating

Rock & Ice Climbing: Rock climbing; Ice climbing; Heli-skiing

Swimming & Sunbathing: Sunbathing or sitting on a beach; Swimming in oceans; Swimming in lakes

Natural Sightseeing: Wildflower & flora viewing; Birdwatching; Going on picnics in park settings

Natural Phenomena: Seeing the northern lights or other Arctic experiences; Whale watching

Appendix Five
Factor Analysis of Cultural & Entertainment Activities Participated In

The cultural and entertainment vacation activities sought in the last two years were submitted to a factor analysis to identify general categories of cultural and entertainment activities sought during travel. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories of cultural and entertainment activities that tend to be sought by individuals while travelling. The factors may be used to generate factor scores which measure the degree to which these general categories of cultural and entertainment activities have been pursued by various segments of the travel market. This analysis identified the following 15 activity types:

Shopping & Dining: **Shopping or browsing**: Clothing, shoes, jewelry; Bookstores and music stores; Local arts and crafts; Gourmet food; **Restaurant dining**: Regional or local cooking; Acclaimed restaurants

Museums, Art Galleries & Historical Sites: General history/heritage museums, Historical sites (e.g., Statue of Liberty, Fort Alamo), Science & technology museums, Historical replicas/re-enactments, Art galleries

High Arts: Opera, Classical concerts, Ballet or other dance performance, Live theatre

Theme Parks: Movie theme parks (MGM studios), Science & technology theme parks (Epcot), Amusement parks (Disneyland)

Professional Sports: Baseball, Football, Basketball, Ice hockey, Professional golf

Zoos, Aquariums, Planetariums: Zoos, Aquariums, Children's museums, Planetariums

Agricultural & Local Fairs: Farmers' fair or market, Local festivals or fairs, Pick-your-own farms or participating in harvesting, Shop or browse for antiques

Concerts, Carnivals or Festivals: Music festivals, Carnivals such as Mardi Gras, Jazz concerts, Rock & roll concerts, Musical attractions like Rock'n Roll Museum

Aboriginal Cultural Experiences: Aboriginal cultural experiences in remote settings, Powwows or other aboriginal celebrations, Aboriginal attractions such as the Indian Museum

Gardening & Natural Wonders: Botanical gardens, Garden attractions such as Cypress Gardens or Tivoli Park, Natural wonders such as Niagara Falls or the Grand Canyon

Cultural Festivals: Literary festivals or events, Theatre festivals, International film festivals

National/International Sporting Events: National/International sporting events, Professional figure skating

Gambling & Racing: Horse racing, Casinos, Auto racing

Rodeo & Amateur Tournaments: Western theme events such as rodeos, Amateur sports/arts/hobby tournaments

French Canadian Cultural Experiences: French Canadian cultural experiences

Appendix Six

Factor Analysis of Accommodation-Related Activities Participated In

The types of accommodation-related activities participated in during the last two years were submitted to a factor analysis to identify general activity-related accommodation types. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories of activity-related accommodations. The factors may be used to generate factor scores which measure the degree to which general types of activity-related accommodations have been stayed in by each segment of the travel market. This analysis identified the following seven types of activity-related accommodations:

Camping: Camping outside of public camp grounds, Camping in public camp grounds, Camping in wilderness settings

Cooking & Wine Tasting Schools: Staying at cooking school, Staying at wine tasting schools

Lakeside or Wilderness Lodges (Vehicle Accessible): Vehicle accessible wilderness lodge, Lakeside resort in summer, Lakeside resort in winter

Remote Fly-in Lodges or Outposts: Staying at remote fly-in outpost, Staying at remote fly-in lodge

Ski Resorts: Staying at ski resort in summer, Staying at ski resort in winter

Seaside Resorts: Staying at seaside resort in winter, Staying at seaside resort in summer

Bed & Breakfast, Health Spas & Gourmet Restaurants With Accommodations: Staying at bed & breakfast, Staying at health spa, Staying at gourmet restaurants

Appendix Seven

Factor Analysis of Tours & Cruises Taken During Last Two Years

The types of tours and cruises taken during the last two years were submitted to a factor analysis to identify general tour/cruise types. Factor analysis is a statistical technique which uses the association between responses to individual items to construct more general (or abstract) categories of touring activities. The factors may be used to generate factor scores, which measure the degree to which each category of tours has been taken by various types of travellers. This analysis identified seven types of tours and cruises:

Tours By Personal Vehicles: Coastal or lakeshore scenic drives by day, Wandering around small villages & towns - overnight

Guided Bus Tours: Scenic day tours in countryside by bus, Guided bus day tours in cities, Guided scenic tours of countryside involving an overnight stay

Wine Tours: Going to wineries for day visits, Touring a region's wineries involving an overnight stay

Specialty Cruises: Great Lakes cruises by boat involving an overnight stay, Submarine cruises involving an overnight stay

Scenic Tours By Boat or Train: Scenic day or evening tour by boat, Scenic day tours by train

Scenic Day Tour By Air: Scenic day tour by air

Ocean Cruises: Ocean cruises

Appendix Eight
Factor Analysis of Canada's Image Attributes

The image ratings of Canada and Ontario were factor analysed to identify the primary image dimensions upon which Canada and Ontario were assessed. Factor analysis is a statistical technique which uses the association between each individual image attribute to construct more general image attributes. The more general image dimensions identified through this process are considered to reflect the underlying (or true) impressions of Canada and Ontario that have been the basis of the individual's response to each attribute. The factors may be used to generate factor scores which measure the degree to which each general impression of Canada or Ontario is held by the respondent. The 25 image factors were grouped into two broader image dimensions as follows:

Culture & Entertainment

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history, and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centres than its natural richness and opportunities for outdoor vacation activities. The specific image attributes that tend to be associated with this factor include: A popular, trendy place; A place with many cultural attractions and events; A great place to experience city life (e.g., nightlife, shopping); A place with interesting shops; A place you go for romance; A great place to see historical sites and important places in history; A place with lots of things for young adults to see and do; A place with lots for families to see and do; A great place to experience different cultures and ways of life; A place with lots of things for mature adults to see and do.

Nature & Outdoor Activities

A destination that is perceived to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for, and to be a place that respects the natural environment. Destinations that offer opportunities to experience nature and participate in outdoor activities are also perceived to be very safe for tourists, great places to relax and get away from it all, and great places for adventure and excitement. Such destinations are generally better known for their natural richness than their urban and cultural richness. The specific image attributes that tend to be associated with this factor include: A great place for hunting; A place that respects the natural environment; One of the best destinations for outdoor activities; A place with beautiful scenery; A place that is very clean and well cared for; A place that is safe for tourists; A great place for adventure and excitement; A great place to relax and get away from it all.

Culture & Entertainment

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history, and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centres than its natural richness and opportunities for outdoor vacation activities.

- A popular, trendy place
- A place with many cultural attractions and events
- A great place to experience city life (e.g., nightlife, shopping)
- A place with interesting shops
- A place you go for romance
- A great place to see historical sites and important places in history
- A place with lots of things for young adults to see and do
- A place with lots for families to see and do
- A great place to experience different cultures and ways of life
- A place with lots of things for mature adults to see and do

Nature & Outdoor Activities

A destination that is perceived to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for, and to be a place that respects the natural environment. Destinations that offer opportunities to experience nature and participate in outdoor activities are also perceived to be very safe for tourists, great places to relax and get away from it all, and great places for adventure and excitement. Such destinations are generally better known for their natural richness than their urban and cultural richness.

- A great place for fishing
- A great place for hunting
- A place that respects the natural environment
- One of the best destinations for outdoor activities
- A place with beautiful scenery
- A place that is very clean and well cared for
- A place that is safe for tourists
- A great place for adventure and excitement
- A great place to relax and get away from it all